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OPPORTUNITIES FOR MARKETING PC SOFTWARE

A STUDY CONDUCTED AMONG FORTUNE SUBSCRIBERS

1989

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OBJECTIVES

The purpose of this study was to provide a comprehensive picture of the degree to which business executives overall -- and top managers in particular -- are involved with personal computers (PCs) and PC software. The research explored the following questions:

1. What is the extent to which business executives personally use PCs at work?

2. What are companies' current usage levels of various PC brands, PC peripherals and enhancements, and PC software?

3. What are companies' acquisition plans for various PC brands, PC peripherals and enhancements, and PC software?

4. How familiar are business executives with various PC software programs -- and how knowledgeable are they about the companies that make these programs?

5. What is the process by which companies make PC software purchase decisions?

6. How involved are business executives in making PC software purchase decisions?

7. What sources do business executives rely on for information about PCs and PC software programs?

8. What is the extent to which business executives use PCs at home -- and for what purposes?

METHOD

This study was based on a random sample of subscribers to FORTUNE Magazine. FORTUNE subscribers represent a reasonable surrogate for the target market because FORTUNE subscribers are employed in companies that are apt to use PCs and occupy positions within their companies that might influence PC and PC software purchase decisions.

In addition, FORTUNE subscribers contain a high incidence of top managers. This allows us not only to examine the role of business executives in general but also to explore the extent to which top managers use PCs and the role they play in making PC and PC software purchase decisions.

The study was conducted in two stages: (a) an initial stage assessed the extent to which FORTUNE subscribers were involved with PCs and PC software, and (b) a follow-up stage probed knowledgeability, usage patterns, acquisition plans, etc., among those who, in the initial stage, indicated that they were involved with PCs and PC software.

The initial stage involved sending a one-page questionnaire -- along with a cover letter from the FORTUNE publisher and a one dollar incentive as "a token of appreciation" -- to a random sample of 2,000 FORTUNE subscribers. The questionnaire asked a series of questions designed to assess the level and nature of respondents' involvement with PCs and PC software.

Of the 2,000 initial questionnaires sent out, 26 were not deliverable -- leaving an effective mailing of 1,974. Of these 1,974 initial questionnaires, 1,081 were filled out and returned -- yielding a return rate of 54.8%.

Of the 1,081 initial questionnaires returned, 871 qualified for the follow-up phase of the investigation -- i.e., they were involved, in one way or another, with PCs and PC software at work.

The follow-up stage involved sending a twelve-page questionnaire -- along with a cover letter from the FORTUNE publisher and a five dollar incentive as "a token of appreciation" -- to these 871 respondents.

Of the 871 follow-up questionnaires sent out, 7 were not deliverable -- leaving an effective mailing of 864. Of these 864 follow-up questionnaires, 452 were filled out and returned -- yielding a return rate of 52.3%.

The initial questionnaire was in the field from June 16 through July 18, 1988. The follow-up questionnaire was in the field from August 8 through September 8, 1988. A copy of all of the mailing materials is in the Appendix.

Pulse On America, Inc., an independent research company located in Great Neck, New York, was responsible for all field work and tabulations.

EXECUTIVE SUMMARY

The PC And PC Software Involvement Of FORTUNE Subscribers

- Business executives (as represented by FORTUNE subscribers) are highly involved with PCs and PC software at work.

  81% of FORTUNE subscribers are involved in one way or another with PCs and PC software at work. This includes 78% of FORTUNE subscribers who use or have access to a PC, 69% who directly supervise employees who use PCs, 58% who are involved in the procurement of PC software, and 52% who personally use PCs at work.

- Top managers (as represented by FORTUNE top manager subscribers) are as involved as -- or even more involved than -- business executives as a whole with PCs and PC software at work.

  87% of FORTUNE top manager subscribers, compared with 81% of FORTUNE subscribers as a whole, are involved in one way or another with PCs and PC software at work. This includes 82% of top managers who use or have access to a PC, 80% of top managers who directly supervise employees who use PCs, 74% of top managers who are involved in the acquisition of PC software, and 52% of top managers who personally use PCs at work.

- In addition to personally using PCs at work, a substantial percentage of FORTUNE subscribers report that they are professional or competent users of PCs.

  46% of FORTUNE subscribers as a whole -- and 46% of FORTUNE top manager subscribers -- indicate that they are professional or competent users of PCs.

- As further evidence of their experience and involvement, FORTUNE subscribers -- including top managers -- are asked their opinion about PC and related products in the PC field.

  64% of FORTUNE subscribers -- and 64% of top managers -- who personally use PCs at work -- are asked their opinion about PCs and PC-related products.

PC Experience And Usage

- Business executives -- including top managers -- are experienced users of PCs.

  Business executives who personally use PCs at work have been using PCs an average of 3.6 years and use PCs an average of 11.1 hours per week.

Similarly, top managers who personally use PCs at work have been using PCs an average of 3.7 years and use PCs an average of 10.7 hours per week.

PC Makes and Models

- IBM is the leading brand of PC -- both in terms of current usage and future buying expectations.

  59% of business executives who personally use PCs at work use IBM equipment. And of those companies expected to buy PCs in the next 12 months, 60% expect to buy IBM.

- While IBM holds a strong No. 1 position, Apple and Compaq -- according to those surveyed -- might be expanding their shares of the PC business market.

  26% report that their company might buy Apple equipment the next time, compared with 19% who personally use Apple at work now.

  Similarly, 24% indicate that their company might buy Compaq equipment the next time, compared with 13% who personally use Compaq at work now.

PC Peripherals and Enhancements

- Business executives who personally use PCs at work make heavy use of PC peripherals and enhancements.

  90% use printers, including dot matrix printers (64%), laser printers (46%), and ink jet printers (17%).

  Other PC peripherals and enhancements used by business executives who personally use PCs at work include: hard disk drives (70%), color monitors (51%), modems (48%), expanded memory boards (36%), and graphics boards (35%).

- A sizeable 48% of business executives who personally use PCs at work indicate that their company might acquire PC peripherals and enhancements for their personal use in the next 6 month period.

  The PC peripherals and enhancements that are most apt to be acquired for their personal use are: laser printers (16%), expanded memory boards (12%), modems (12%), color monitors (12%), graphics boards (10%), and LAN boards (10%).

- Local area network (LAN) systems appear to be an important growing factor in the business PC field.

  Of those who manage employees who use PCs, over one-third (37%) report that their company has a LAN system.

  And of those whose company does not have a LAN system, one-fifth (20%) indicate that their company is apt to acquire such a system in the next 6 month period.

PC Software Programs

- In addition to making widespread use of PC peripherals and enhancements, business executives who personally use PCs utilize a wide variety of PC software programs.

  The types of PC software that are most widely used by business executives who personally use PCs at work are: word processing (74%) and spreadsheet (64%).

  Other types of PC software that are often used by business executives who personally use PCs at work are: graphics (33%), communications (31%), relational data base management (28%), accounting (25%), general business (22%), time and calendar organizers (21%), and flat file data base management (18%).

- About four out of ten business executives who are involved with PCs at work (39%) report that their company is apt to acquire additional PC software programs in the next 6 month period.

  The types of PC software that companies are most apt to acquire are: desktop publishing (16%), graphics (13%), presentation packages (12%), relational data base management (12%), word processing (10%), and spreadsheet (10%).

  It might be noted that, while desktop publishing ranks only No. 10 among the types of PC software that business executives personally use now, desktop publishing ranks No. 1 among the types of PC software that they expect their company to acquire in the next 6 month period.

Knowledgeability About Particular PC Software Programs

- Although a majority of business executives personally use PCs and/or manage employees who use PCs, they are not too familiar with the names of most PC software programs.

  Except for a half dozen well-known programs -- dBASE III, 1-2-3, WordStar, WordPerfect, Symphony and SuperCalc -- most programs are familiar to fewer than half of the PC-involved business executives surveyed. As a matter of fact, 21 of the 34 programs studied are recognized by fewer than one-third of those surveyed.

- Even among those who have heard of the PC software programs, relatively few PC-involved business executives are able to correctly identify the program with the company that manufactures it.

  Correct recognition scores, i.e., the percent who correctly associate a program with the company that offers it -- fall below 40% for 25 of the 34 programs studied.

Process Of Acquiring PC Software Programs

- Business executives play multiple roles in their company's acquisition of PC software programs.

  75% of those who are involved in the PC software decision-making process assess the need to acquire programs; 57% participate in determining the capabilities and features needed; 42% play a role in brand evaluation; 50% make the final acquisition decision; and 46% authorize expenditures for program acquisitions.

- The EDP/MIS department plays an important -- and growing -- role in the acquisition of PC software.

  About one-half of the business executives surveyed (48%) report that their company has an EDP or MIS department. And of those in companies that have an EDP/MIS department, 58% indicate that the EDP/MIS department is playing a more involved role now in PC software purchase decisions that it was 2 to 3 years ago, compared with only 10% who say that the EDP/MIS department is less involved now.

- When making decisions about selecting a particular software program, business executives in a decision-making role indicate that they place importance not only on the reputation of the program but also on the support services offered by the company that makes it -- particularly when the program is first acquired.

The factors that they most often cite as "very important" in selecting a particular software program are: good reputation (54%), can get phone support when needed (52%), easy for "beginners" to learn (48%), and offers a training program (39%).

PC Software Training Programs

- While business executives who influence their company's PC software purchase decisions place importance on PC software training programs, they do not express any consensus about who should provide such training programs.

  36% feel that the PC software manufacturer should be responsible, 34% think that the retail store from which the program was purchased should be responsible, and 29% believe that internal company personnel should bear the responsibility for training employees to use the program.

- Business executives in large companies and small companies have different preferences about who should handle PC software training programs.

  Business executives in large companies most often think that internal company personnel should handle the training program, while business executives in small companies most often feel that the retail store should provide the training program.

Sources of PC And PC Software Information

- The main sources of information about PCs and PC software that are relied on by business executives who are influential in PC software acquisition are: discussions with friends and/or colleagues (78%); reading articles about new computer developments in general business magazines (75%); and reading or looking at advertisements about PCs and PC-related products (73%).

  No other source is relied upon by a substantial majority of the influential business executives surveyed.

- Of 18 individual PC-oriented magazines studied, over half of the influential business executives surveyed (55%) report that they do not regularly read <u>any</u> of these specialty publications.

  Moreover, <u>none</u> of the 18 individual PC-oriented magazines achieves much reach among business executives who make PC software purchase decisions -- i.e., none of these magazines is read regularly by even a fifth of the influential business executives surveyed.

Business Executives And The Home PC Market

- The business PC market seems to have a carryover effect on the home PC market.

  Of the business executives who use a PC at work or manage employees who use PCs at work, about half (52%) use a PC at home for business and/or personal reasons.

  Of the top managers who use a PC at work or manage employees at work, an even larger percent (59%) use a PC at home for business and/or personal reasons.

DETAILED RESULTS

FORTUNE Subscribers' Involvement

Business executives (based on the initial questionnaires sent to a random sample of FORTUNE subscribers) are highly involved with PCs and PC software at work.

78% of business executives have access to PCs at work, 69% directly supervise employees who use PCs, 58% are involved in the procurement of PC software, and 52% personally use PCs at work. Overall, a high 81% of business executives surveyed indicate that -- in one way or another -- they are involved with PCs and PC software at work.

In addition to being involved with PCs, a majority of the business executives surveyed report that their companies are actively involved in purchasing PC equipment. 51% indicate that their companies are considering acquiring additional PCs in the next 12 month period.

Moreover, business executives who manage PC users oversee an average of 11.2 PCs in their company, division or department. As might be expected, there are far more PCs managed by business executives in large companies than by those in small companies -- an average of 18.0 PCs in large corporations vs. 3.9 PCs in small corporations.

Top Managers' Involvement

Top managers (based on the initial questionnaires sent to a random sample of FORTUNE subscribers) are as involved as -- or even more involved than -- business executives as a whole with PCs and PC software at work.

80% of top managers, compared with 69% of business executives as a whole, directly supervise employees who use PCs. 74% of top managers, compared with 58% of business executives as a whole, are involved in the procurement of PC software. And 52% of top managers -- like 52% of business executives as a whole -- personally use PCs at work.

Overall, 87% of top managers, compared with 81% of business executives as a whole, are in one way or another involved with PCs and PC software.

PC Experience And Usage

Business executives who personally use PCs at work indicate that they have been using PCs for a fairly long time and they make regular use of them. They report that they have been using PCs for an average of 3.6 years and they use PCs an average of 11.1 hours per week.

Top managers are as experienced with PCs as business executives as a whole. Top managers who personally use PCs at work have been using PCs an average of 3.7 years and use them an average of 10.7 hours per week.

As might be expected, business executives in small companies (under 100 employees) spend more time personally using PCs than business executives in large companies (1,000 or more employees). Nevertheless, business executives in large companies also make extensive personal use of PCs. Business executives in small corporations who use PCs use them an average of 13.1 hours per week, compared to an average of 10.5 hours per week for business executives in large corporations.

As additional evidence of their experience and involvement, a sizeable 64% of business executives who use PCs report that others ask them their opinion about PCs and related products in the PC field.

PC Skills And Enjoyment

In addition to making regular use of PCs, many business executives and top managers regard themselves as having good PC skills. 46% of business executives and 46% of top managers report that they are professional or competent users of PCs.

Moreover, most business executives and top managers who personally use PCs at work enjoy using them. 89% of business executives and 90% of top managers who use PCs find it enjoyable to use this equipment.

PC Makes And Models

The following are the principal makes and models that business executives personally use at work now and the ones that their company/division/department might acquire in the next 12 months (among those who might be buying new PC equipment over that time period):

	Personally Use Now	Company Might Buy In Next 12 Months
IBM	59%	60%
XT	20	5
AT	18	6
PS/2	11	23
Apple	19	26
Mac SE	8	8
MacIntosh II	6	12
Compaq	13	24
AT&T	6	3
Leading Edge	4	4
Tandy/Radio Shack	4	2
Wang	4	4
Wyse	4	4
Epson	3	4
Toshiba	3	5
Hewlett-Packard	3	1
Zenith	3	3

As shown above, IBM is the market leader both in terms of current usage and future buying expectations. 59% of business executives who personally use PCs use IBM equipment. And 60% of those who report that their company, division or department might acquire PCs in the next 12 months are considering purchasing IBM equipment.

While IBM is apt to continue to hold the No. 1 position, Apple and Compaq -- based on future buying expectations -- might be making stronger future inroads into the PC market. 26% report that their company might buy Apple equipment the next time, compared with 19% who personally use Apple now. Similarly, 24% indicate that their company might buy Compaq equipment the next time, compared with 13% who personally use Compaq now.

A sizeable minority of IBM and IBM-compatible users express interest in the OS/2 operating system. Of those who personally use or expect to buy IBM or IBM-compatible PC equipment, 18% indicate that they are "very likely" or "fairly likely" to acquire an OS/2 operating system in the next six month period, on top of the 4% who already have an OS/2 operating system.

PC Peripherals And Enhancements

The following are the PC peripherals and enhancements used at work by (a) business executives who personally use PCs and (b) the subordinates of business executives who manage employees who use PCs:

	Business Executives Personally Use	Subordinates Use
Use PC peripherals and enhancements	94%	88%
Printer	90%	86%
Dot matrix printer	64	68
Laser printer	46	48
Ink jet printer	17	15
Hard disk drive	70	72
Color monitor	51	48
Modem	48	52
External modem	32	40
Internal modem	26	31
Expanded memory board	36	38
Graphics board	35	36
Local area network (LAN) board	17	23
Plotter	14	19
FAX board	6	8
Scanner	6	6

As shown above, business executives who personally use PCs and subordinates who use PCs both make heavy use of PC peripherals and enhancements. Moreover, the types of PC peripherals and enhancements used by the two groups are similar.

For both groups, the PC peripherals used most often are: printers (particularly dot matrix printers and laser printers), hard disk drives, color monitors, modems, expanded memory boards, and graphics boards.

The following are the PC peripherals and enhancements that might be acquired in the next 6 months for the use of (a) business executives who personally use PCs and (b) the subordinates of business executives who supervise employees who use PCs:

	Might Be Acquired For Business Executives	Might Be Acquired For Subordinates
Might acquire PC peripherals and enhancements in next 6 months	48%	41%
Printer	22	23
Laser printer	16	19
Dot matrix printer	5	7
Ink jet printer	5	6
Color monitor	12	14
Modem	12	12
External modem	8	8
Internal modem	7	7
Expanded memory board	12	9
Local area network (LAN) board	10	12
Graphics board	10	11
FAX board	8	7
Scanner	7	6
Hard disk drive	6	11
Plotter	6	7

As shown above, almost half of the business executives who personally use PCs and who manage employees who use PCs report that their companies might buy PC peripherals and enhancements -- for their own use and for their subordinates' use -- in the next 6 month period. Moreover, the types of PC peripherals and enhancements the companies are most apt to purchase for both groups are similar.

For both groups, the principal PC peripherals and enhancements that are most apt to be purchased are: printers (particularly laser printers), color monitors, modems, expanded memory boards, LAN boards, and graphic boards.

Of those who manage employees who use PCs, over one-third (37%) report that their company, division or department has a local area network (LAN) system. Large companies are almost twice as likely as small companies to have LAN systems (47% vs. 26%).

Of those who manage PC users and who do not currently have a LAN system, one-fifth (20%) report that they are likely to acquire a LAN system in the next six months. Small companies are more apt than large companies to expect to acquire a new LAN system (19% vs. 14%).

PC Software Programs

The following are the PC software programs that are used at work by (a) business executives who use PCs and (b) the subordinates of business executives who manage employees who use PCs:

	Business Executives Personally Use	Subordinates Use
Word processing	74%	83%
Spreadsheet	64	67
Graphics	33	36
Communications	31	31
Relational data base management	28	35
Accounting	25	38
General business	22	19
Time and calendar organizer	21	21
Flat file data base management	18	19
Desktop publishing	14	20
Project management	12	15
Integrated/multi function	11	15
Presentation package	11	16
CAD/CAM	5	8

As shown above, word processing and spreadsheet are the most widely used PC software programs. In addition, graphics, communications, relational data base management, and accounting are broadly used programs.

As also shown above, the types of software used by business executives and their subordinates are largely similar. There are, however, a few PC software programs that subordinates use somewhat more often than business executives do. The PC software programs that are used more often by subordinates than by business executives are: word processing (83% vs. 74%), relational data base management (35% vs. 28%), desktop publishing (20% vs. 14%), and presentation packages (16% vs. 11%).

The types of PC software programs used by business executives vary by company size:

- Business executives in large companies are more likely than those in small companies to use: spreadsheet (69% vs. 56%), graphics (40% vs. 25%), communications (37% vs. 25%), and presentation packages (20% vs. 5%).

- Business executives in small companies are more apt than those in large companies to use: accounting (40% vs. 12%), general business (30% vs. 16%), desktop publishing (16% vs. 11%), and CAD/CAM (10% vs. 4%).

About four out of ten business executives who are involved with PCs at work (39%) report that their companies might acquire additional PC software in the next 6 month period. The PC software programs that they most often indicate they might purchase are: desktop publishing, graphics, presentation packages, and relational data base management.

	Company Might Acquire in Next 6 Months
Desktop publishing	16%
Graphics	13
Presentation package	12
Relational data base management	12
Word processing	10
Spreadsheet	10
Project management	9
Accounting	8
Time and calendar organizer	8
Communications	8
Flat file data base management	6
CAD/CAM	4
General business	4
Integrated/multifunction	4

It might be noted that desktop publishing ranks only No. 10 among the types of PC software programs that business executives use now, but desktop publishing ranks No. 1 among the programs that they anticipate their companies will acquire in the next 6 month period.

Familiarity With Particular PC Software Programs

Business executives' familiarity with particular PC software programs varies widely across the programs studied.

Interestingly, top managers very closely resemble business executives as a whole in their familiarity with various PC software programs.

	Business Executives	Top Management
Heard of:		
dBASE III	77%	76%
1-2-3	77	75
WordStar	72	73
WordPerfect	71	72
Symphony	62	61
SuperCalc	51	55
DisplayWrite	46	45
AppleWorks	45	44
MultiMate	45	44
MultiPlan	44	45
Excel	42	43
Windows	37	38
MacDraw	33	35
Harvard Graphics	29	29
Pagemaker	27	29
PFS:Professional Write	27	27
Quattro	27	30
Word	26	27
Framework	25	26
MacProject	21	21
PFS:First Publisher	19	19
Paradox	18	17
Chart-Master	17	15
Ventura Publisher	17	20
Works	13	10
Cricket	10	8
RapidFile	8	8
Silverado	8	9
MasterGraphics	6	6
Smartform	6	7
ACCPAC	4	3
Power Point	4	3
Sales Generator Plus	3	4
SuperProject Expert	3	2

As shown above, only a few of the 34 PC software programs about which business executives were asked are familiar to half or more of them. These are: dBASE III (77%), 1-2-3 (77%), WordStar (72%), WordPerfect (71%), Symphony (62%), and SuperCalc (51%).

A majority of the PC software programs about which business executives were asked -- 21 out of the 34 programs -- are familiar to fewer than one-third of those surveyed.

Thus, while a few PC software programs enjoy relatively wide recognition among business executives, many of these programs suffer from low name recognition.

Manufacturer Identification With Particular Software Programs

As shown in the table on the following two pages, business executives do not do well in identifying the companies that offer various PC software programs. (Company identification of PC software programs was determined by asking respondents to indicate -- from a list of PC software manufacturers -- which company offers each program.)

Out of 34 PC software programs studied, 1-2-3 is the one that is, by far, most often correctly associated with the company that makes it. 81% of those who have heard of 1-2-3 know that Lotus Development Corporation offers it.

There are three programs which are correctly associated with the companies that make them by 50%-59% of those who are familiar with those programs. The programs which fall into this range of correct association are: Word, with Microsoft Corporation, 59%; Symphony, with Lotus Development Corporation, 54%; and SuperProject Expert, with Computer Associates International, 50%.

There are five additional programs which are correctly associated with their companies by 40%-49% of those who are familiar with those programs. These programs are: Works, with Microsoft Corporation, 49%; WordPerfect, with WordPerfect Corporation, 47%; Ventura Publisher, with Xerox Corporation, 46%; Cricket, with Cricket Software, 45%; and Windows, with Microsoft Corporation, 44%.

Except for the above handful of PC software programs, none of the others achieve as high as a 40% correct manufacturer recognition score.

The details of the incorrect responses for each PC software program studied are shown in the tables on pages 57 - 90.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

Software Program	Manufacturer	Correct Association	Incorrect Association	Don't Know	Correct Minus Incorrect Association	Number Who Heard Of PC Software Program
1-2-3	Lotus Development Corporation	81%	3%	16%	+78%	(336)
WORD	Microsoft Corp.	59	3	38	+56	(113)
SUPERPROJECT EXPERT	Computer Assoc. International	50	-	50	+50	(12)†
SYMPHONY	Lotus Development Corporation	54	4	42	+50	(271)
WORKS	Microsoft Corp.	49	-	51	+49	(57)†
CRICKET	Cricket Software	45	2	53	+43	(42)†
VENTURA PUBLISHER	Xerox Corp.	46	4	50	+42	(72)
WINDOWS	Microsoft Corp.	44	3	53	+41	(162)
WORDPERFECT	WordPerfect Corp.	47	9	44	+38	(315)
POWER POINT	Microsoft Corp.	35	-	65	+35	(17)†
PAGEMAKER	Aldus Corp.	39	6	55	+33	(118)
DISPLAYWRITE	IBM	31	2	67	+29	(198)
dBASE III	Ashton-Tate	39	12	49	+27	(337)
EXCEL	Microsoft Corp.	34	7	59	+27	(184)
QUATTRO	Borland Int'l.	31	5	64	+26	(115)
PARADOX	Ansa Software or Borland Int'l.	26	5	69	+21	(75)
FRAMEWORK	Ashton-Tate	30	11	59	+19	(104)
PFS: FIRST PUBLISHER	Software Publishing	30	12	58	+18	(83)
RAPIDFILE	Ashton-Tate	24	6	70	+18	(33)†

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

(Continued)

Software Program	Manufacturer	Correct Association	Incorrect Association	Don't Know	Correct Minus Incorrect Association	Number Who Heard Of PC Software Program
ACCPAC	Computer Assoc. Corporation	31%	19%	50%	+12%	(16)†
PFS: PROFESSIONAL WRITE	Software Publ. Corporation	24	12	64	+12	(117)
CHART-MASTER	Ashton-Tate	10	2	88	+8	(72)
MACDRAW	Claris Corp.	20	12	68	+8	(143)
MASTER GRAPHICS	Ashton-Tate	8	-	92	+8	(26)†
MULTIPLAN	Microsoft Corp.	18	11	71	+7	(187)
MACPROJECT	Claris Corp.	21	16	63	+5	(90)
HARVARD GRAPHICS	Software Publ. Corporation	12	9	79	+3	(125)
SALES GENERATOR PLUS	Supersell Software Inc.	-	-	100	-	(14)†
SMARTFORM	Claris Corporation	4	4	92	-	(28)†
SILVERADO	Computer Assoc. International	9	11	80	-2	(35)†
APPLEWORKS	Claris Corporation	9	14	77	-5	(202)
MULTIMATE	Ashton-Tate	13	18	69	-5	(193)
WORDSTAR	MicroPro	13	19	68	-6	(319)
SUPERCALC	Computer Assoc. International	7	15	78	-8	(223)

† Sample size is very small, interpret cautiously.

Business Executives' Role In PC Software Purchase Decisions

The business executives who are involved in PC software purchase decisions play a variety of roles in making such decisions. These roles include: assessing the need for PC software acquisitions, determining the capabilities or features needed, evaluating brands of PC software programs, making the final acquisition decision, and authorizing expenditures for PC software programs.

	Roles Played
Assessing the need	75%
Determining capabilities or features needed	57
Making final decision to acquire	50
Authorizing expenditures	46
Evaluating brands	42
Recommending or specifying brands	35
Recommending or specifying manufacturers	23
Recommending or specifying the source or outlet from which to acquire the software	22

As might be expected, business executives in small companies play a broader role in PC software acquisition decisions than business executives in large companies. Most notably, business executives in small companies are more apt than business executives in large companies to participate in brand evaluations (52% vs. 35%), authorizing expenditures (59% vs. 39%), and making final acquisition decisions (71% vs. 32%).

EDP/MIS Departments' Role In PC Software Purchase Decisions

About one out of two business executives surveyed (48%) report that their company has an EDP or MIS department.

The business executives in companies that have an EDP or MIS department tend to report that this department is playing a stronger role now in the company's PC software purchase decisions than the department played 2 to 3 years ago. 58% indicate that the EDP/MIS department is more involved in purchase decisions now than it was 2 to 3 years ago, compared with only 10% who say that the EDP/MIS department is less involved in purchase decisions now.

Company Policies Regarding PC Software Purchase Decisions

Company policies regarding PC software purchase decisions vary depending on whether they have or do not have an EDP/MIS department.

- In companies that have an EDP/MIS department, the major policies are that new PC software purchases must have the approval of the department head (55%) or the EDP/MIS department (43%).

- In companies that do not have an EDP/MIS department, the major policy is that new PC software purchases must be compatible with existing equipment/products (41%) or the company does not have a policy at all (40%).

Company policies regarding PC software purchse decisions also vary by company size.

- Large companies are more apt than small companies to require that new PC software purchases have the approval of the department head (58% vs. 20%), to require that new PC software purchases have the approval of the EDP/MIS department (41% vs. 11%), to require that the need for new PC software be documented (34% vs. 9%), and to restrict the brands of PC software that can be purchased (13% vs. 3%).

- By contrast, small companies are more apt than large companies to have no policy at all (42% vs. 7%).

Factors Influencing PC Software Purchase Decisions

A variety of factors influence a company's decision to acquire a particular PC software program. The following is the rank order of factors that are "very important" according to business executives involved in making PC software purchase decisions:

	Very Important
Good reputation	54%
Can get phone support when needed	52
Easy to learn for "beginners"	48
Training is offered	39
Fast processing	38
Price	36
Low risk of obsolescence	35
Established manufacturer	34
Technologically sophisticated	28
Easy to learn for "advanced users"	28

When asked to choose, PC software decision-makers opt for the technological sophistication of the program over being familiar with the software manufacturer, by a 53% to 31% margin.

Large companies are even more apt than small companies to place a premium on the technological sophistication of the program. 60% of those in large companies, compared with 48% of those in small companies, stress the technological sophistication of the program.

PC Training Programs

When asked who they think should provide the training for PC software programs (another important factor in program selection), opinion is divided. 36% of PC software decision-makers feel that the PC software manufacturer should be responsible, 34% think that the retail store should be responsible, and 29% believe that internal company personnel should be responsible for training employees to use the programs.

Business executives in large companies and small companies express sharply divergent views about who should bear the responsibility for PC software training programs.

- Business executives in large companies are much more likely than those in small companies to think that internal company personnel should handle the training program.

- Business executives in small companies are much more apt than those in large companies to feel that the retail store or dealer from which the program was purchased should oversee the training program.

	Large Companies	Small Companies
PC Software Training Should Be Handled By:		
The software manufacturer	34%	36%
The retail store or dealer	19	48
Internal company personnel	47	13

Recent PC Software Purchase Decisions

About two-thirds of business executives who are PC software decision makers (69%) indicate that their department, division or company has acquired PC software programs in the past twelve months.

Of those who have acquired a PC software program in the past twelve months, the most important considerations that entered into the decision were: a review of the product itself, colleague's recommendations, and literature provided by the manufacturer of the program.

	Important Consideration
Product review	65%
Colleague's recommendation	49
Manufacturer's literature	48
EDP/MIS department's recommendation	31
Friend's recommendation	24
Salesperson's recommendation	16

The first three factors listed on the previous page -- product review, colleagues' recommendations, and manufacturers' literature -- are regarded as important by those in all size corporations. But according to those surveyed, large companies and small companies differ in the extent to which they place importance on other considerations.

- Large companies pay more attention than small companies to the EDP/MIS department's recommendations.
- Small companies place more reliance than large companies on friends' recommendations.

	Important Considerations For: Large Companies	Small Companies
EDP/MIS department's recommendation	43%	13%
Friends' recommendation	15	35

Sources For Purchasing PC Software

According to the PC software decision-makers surveyed, the principal sources from which companies have acquired PC software are: from computer retail stores (64%) and direct from the manufacturers of the software (54%).

But there are also a number of other sources from which at least one-quarter of decision-makers have obtained PC software. These are: mail order catalogues, software-only stores, distributors, and value-added resellers, system houses or consultants.

	Sources From Which PC Software Was Ever Acquired
Computer retail stores	64%
Direct from the manufacturer	54
Mail order catalogues	29
Software-only stores	28
Distributors	25
Value-added resellers, system houses or consultants	25
800 toll-free numbers	17
Company EDP/MIS department	15
Office supply stores	10
Mass merchandisers/department stores	4

Large companies and small companies differ in the sources from which they acquire PC software programs:

- o Large companies are more likely than small companies to obtain PC software direct from the manufacturer, from distributors, and from company EDP/MIS departments.

- o Small companies are more apt than large companies to obtain PC software programs from computer retail stores, from mail order catalogues, and from value-added resellers, system houses or consultants.

Sources Of Information About PCs And PC Software

As further evidence of their involvement, PC software decision-makers turn to a wide variety of sources to secure information about PCs and PC software programs.

The three main sources that PC software decision-makers use to obtain information about PCs and PC software programs are: (a) discussions with friends and/or colleagues, (b) reading articles about new computer developments in general business magazines, and (c) reading or looking at PC advertisements.

These are the three main information sources used by decision-makers in all company sizes -- large, medium-sized and small corporations.

	Sources Of PC Information
Discuss PCs with friends and/or colleagues	78%
Read articles about new computer developments in general business magazines	75
Read or look at advertisements about PCs or PC products	73
Read PC-oriented magazines	58
Visit computer stores	48
Visit PC software stores	35
Read books about computers	33
Mail away for more information about PCs or PC products	29
Use an 800 toll-free number for PC information	23
Attend computer conferences or trade shows	22
Take courses in computer literacy or applications	16
Take courses in a computer programming language	7

Of 18 PC-oriented magazines studied, over half of the PC software decision-makers surveyed (55%) report that they do not regularly read any of these specialty publications. Moreover, none of the 18 individual PC-oriented magazines studied reaches even a fifth of business executives who make PC software purchase decisions.

	Read Regularly
PC Magazine	17%
Personal Computing	13
PC World	12
ComputerWorld	11
BYTE	10
PC Computing	9
PC Week	9
Lotus	8
InfoWorld	8
Datamation	7
Information Week	6
MacUser	5
MIS Week	5
MacWorld	5
Compute	3
Online Today	3
MacWeek	2
Family And Home Office Computing	1

PC Usage At Home

The business PC market seems to have a carryover effect on the home PC market.

Of those who use a PC at work or manage employees who use PCs at work, about half (52%) use PCs at home, too. This includes 41% who use PCs at home for business reasons and 46% who use PCs at home for personal reasons. A sizeable 35% use PCs at home for both business and personal reasons.

Top managers are as likely -- or perhaps even more likely -- as business executives as a whole to use PCs at home as well as at work. Of those who use a PC at work or manage PC users at work, 59% of those top managers, compared with 52% of business executives as a whole, use PCs at home for business and/or personal reasons.

A significant number of business executives -- 45% -- indicate that they are likely to buy a PC for home use or upgrade a home PC in the next year.

TABLES

INVOLVEMENT WITH PERSONAL COMPUTERS

	FORTUNE Subscribers (1081)	FORTUNE Top Management Subscribers (453)
Use Or Have Access To PC At Work		
Yes	78%	82%
No	21	18
No answer	1	*
Personally Use A PC At Work		
Yes	52%	52%
No	47	48
No answer	1	*
Direct Supervision Of People Who Use A PC At Work		
Yes	69%	80%
No	29	20
No answer	2	*
Involved In Procurement Of PC Software At Work		
Yes	58%	74%
No	41	26
No answer	1	-
Overall Involvement With A PC At Work		
Yes, to any of the above questions	81%	87%
No, to all of the above questions	18	13
No answer	1	-

* Less than 0.5 percent

LIKELIHOOD OF COMPANY/DIVISION/DEPARTMENT
ACQUIRING PCs AT WORK IN THE NEXT TWELVE MONTHS

	FORTUNE Subscribers (528)
Likely	51%
Very likely	32
Fairly likely	19
Not likely	42
Not too likely	17
Not at all likely	25
No idea at all	4
No answer	3

NUMBER OF PCs IN COMPANY/DIVISION/DEPARTMENT

(Among Those Who Manage PC Users)

	Total	PC Software Decision Makers	Top Management	Company Size: 1,000 Or More	Company Size: 100-999	Company Size: Under 100
	(275)	(243)	(153)	(111)	(61)†	(99)
1-2 PCs	35%	35%	35%	21%	40%	49%
3-4 PCs	24	23	22	26	20	23
5-9 PCs	23	23	21	25	20	20
10-19 PCs	7	8	10	13	7	3
20-49 PCs	4	4	4	4	10	1
50-99 PCs	2	3	3	5	2	-
100-199 PCs	1	*	1	1	1	-
200 or more PCs	1	1	1	3	-	-
No answer	3	3	3	2	-	4
Mean (number)	11.2	10.4	12.6	18.0	10.7	3.9
Median (number)	4.0	4.1	4.1	5.2	3.8	2.9

* Less than 0.5 percent

† Sample size is very small, interpret cautiously.

NUMBER OF YEARS PERSONALLY USING A PC AT WORK

(Among Those Who Personally Use A PC)

	Total	PC Software Decision Makers	Top Management	Company Size 1,000 Or More	Company Size 100-999	Company Size Under 100
	(347)	(276)	(151)	(141)	(78)	(119)
Less than 1 year	12%	10%	13%	10%	9%	13%
1-2 years	24	23	20	21	32	23
3-4 years	31	31	30	33	29	28
5-6 years	23	24	25	26	21	23
7-8 years	6	8	9	6	6	8
9-10 years	1	1	1	1	1	2
More than 10 years	2	2	1	2	1	2
No idea at all	*	-	-	-	-	1
No answer	1	1	1	1	1	-
Mean (yrs.)	3.6	3.7	3.7	3.8	3.4	3.7
Median (yrs.)	3.8	3.9	4.0	4.0	3.5	3.9

* Less than 0.5 percent

NUMBER OF HOURS PER WEEK PERSONALLY USE A PC AT WORK

(Among Those Who Personally Use A PC)

	Total	PC Software Decision Makers	Top Management	Company Size: 1,000 Or More	Company Size: 100-999	Company Size: Under 100
	(347)	(276)	(151)	(141)	(78)	(119)
None	1%	1%	2%	-%	1%	2%
1-4 hours	31	30	35	34	33	27
5-9 hours	20	21	17	26	19	13
10-14 hours	14	16	17	10	17	19
15-19 hours	8	8	7	7	9	8
20-24 hours	10	11	9	7	10	13
25-29 hours	5	5	3	6	4	4
30-34 hours	5	5	4	4	3	7
35-39 hours	1	*	1	1	1	1
40-44 hours	2	2	2	3	-	3
45-49 hours	*	*	-	1	-	-
50 or more hours	1	1	1	-	-	1
No answer	2	-	2	1	3	2
Mean (hrs.)	11.1	11.2	10.7	10.5	9.5	13.1
Median (hrs.)	7.5	8.0	6.5	5.0	7.0	10.0

* Less than 0.5 percent

HOW OFTEN ASKED OPINION ABOUT PC PRODUCTS

(Among Those Who Personally Use A PC)

	Total (397)	PC Software Decision Makers (322)	Top Management (179)	Company Size: 1,000 Or More (157)	Company Size: 100-999 (90)	Company Size: Under 100 (139)
Often or sometimes	64%	65%	64%	69%	66%	60%
Often	26	28	24	26	28	27
Sometimes	38	37	40	43	38	33
Seldom or never	35	34	36	31	33	40
Seldom	26	26	26	24	23	30
Never	9	8	10	7	10	10
No answer	1	1	-	-	1	-

PERCEIVED EXPERIENCE AND ABILITIES WITH USING PCs

	FORTUNE Subscribers (528)	FORTUNE Top Management Subscribers (238)
Professional or competent PC user	46%	46%
Professional user	8	7
Competent user	38	39
Beginner or no PC experience	52	52
Beginner user	29	29
No experience with PCs	23	23
No answer	2	2

ENJOYMENT OF USING PCs

(Among Those Who Personally Use A PC)

	Total (397)	PC Software Decision Makers (322)	Top Management (179)	Company Size 1,000 Or More (157)	Company Size 100-999 (90)	Company Size Under 100 (139)
Enjoyable	89%	90%	90%	91%	92%	88%
Very enjoyable	42	43	41	41	46	42
Fairly enjoyable	47	47	49	50	46	46
Not enjoyable	10	9	10	9	7	11
Not too enjoyable	9	8	9	8	6	10
Not at all enjoyable	1	1	1	1	1	1
No answer	1	1	-	-	1	1

MAKES AND MODELS OF PCs PERSONALLY USE AT WORK NOW

(Among Those Who Personally Use A PC)

	Total	PC Software Decision Makers	Top Management	Company Size: 1,000 Or More	Company Size: 100-999	Company Size: Under 100
	(347)	(276)	(151)	(141)	(78)	(119)
IBM	59%	58%	54%	69%	55%	46%
XT	20	21	19	27	15	14
AT	18	19	17	22	14	16
PS/2	11	11	11	13	9	10
Others	2	1	1	2	3	2
Unspecified	17	16	13	18	22	12
Apple	19	21	19	16	23	20
Mac SE	8	8	9	8	6	9
MacIntosh II	6	7	5	6	10	4
2E	2	1	1	-	3	3
2C	1	1	3	-	1	3
Apple II	*	*	1	-	-	1
Others	*	*	1	-	-	1
Unspecified	2	3	1	2	4	1
Compaq	13	14	11	17	9	12
Portable III 286	4	5	3	4	4	3
386 Desk Pro	4	5	5	4	3	7
Others	*	*	-	-	1	-
Unspecified	5	5	3	9	1	3
AT&T	6	6	5	5	9	5
6300	3	3	1	2	3	3
Others	1	1	1	1	1	-
Unspecified	3	3	2	2	5	2
Leading Edge	4	4	3	4	5	3
Others	1	1	-	1	1	2
Unspecified	2	3	3	2	4	2

(Continued)

MAKES AND MODELS OF PCs PERSONALLY USE AT WORK

(Among Those Who Personally Use A PC)

(Continued)

	Total (347)	PC Software Decision Makers (276)	Top Management (151)	Company Size 1,000 Or More (141)	100-999 (78)	Under 100 (119)
Tandy/Radio Shack	4%	4%	4%	1%	3%	6%
Others	3	3	3	1	1	5
Unspecified	1	1	1	-	1	1
Wang	4	4	4	6	5	2
Wang WP Plus	1	*	-	1	1	-
Others	1	*	-	1	-	1
Unspecified	3	3	4	5	4	1
Wyse	4	4	4	4	5	3
286	1	1	1	1	1	-
386	1	1	1	1	1	1
2108	1	1	1	-	1	1
Others	*	-	-	1	-	-
Unspecified	1	1	1	1	1	1
Epson	3	3	3	1	3	3
Equity	1	1	2	-	1	2
Others	*	*	-	-	-	1
Unspecified	1	1	1	1	1	1
Toshiba	3	3	3	6	5	2
1100	1	1	1	2	-	1
1200	*	*	1	1	-	-
Others	1	1	1	1	1	-
Unspecified	*	*	-	-	1	-
Commodore	2	2	3	1	1	3
Omega 2000	1	1	1	-	-	2
Others	1	1	1	1	1	2
Unspecified	*	-	-	1	-	-

(Continued)

MAKES AND MODELS OF PCs PERSONALLY USE AT WORK

(Among Those Who Personally Use A PC)

(Continued)

	Total	PC Software Decision Makers	Top Management	Company Size 1,000 Or More	Company Size 100-999	Company Size Under 100
	(347)	(276)	(151)	(141)	(78)	(119)
All others						
Hewlett-Packard	3%	3%	2%	3%	4%	2%
Zenith	3	3	1	4	4	-
NEC	2	3	2	3	-	3
AST	1	1	1	1	1	2
Tandon	1	1	-	1	1	-
Packard Bell	1	1	1	-	-	2
Others	17	19	25	12	21	24
No answer	1	*	1	1	-	2

* Less than 0.5 percent

MAKES AND MODELS OF PCs THAT MIGHT BE ACQUIRED
BY COMPANY/DIVISION/DEPARTMENT IN THE NEXT 12 MONTHS

(Among Those Likely To Consider Acquiring A PC
In The Next 12 Months)

	Total	PC Software Decision Makers	Top Management	Company Size: 1,000 Or More	Company Size: 100-999	Company Size: Under 100
	(270)	(239)	(139)	(104)	(67)	(96)
IBM	60%	59%	56%	67%	61%	50%
PS/2	23	24	22	31	25	14
AT	6	6	4	7	5	7
XT	5	4	5	8	2	3
Others	2	1	2	3	2	-
Unspecified	32	31	31	30	37	29
Apple	26	29	29	28	22	28
MacIntosh II	12	13	13	15	8	12
Mac SE	8	9	7	11	8	6
2C	-	-	-	-	-	-
2E	*	*	1	-	-	1
Apple II	*	*	1	-	-	1
Others	*	*	1	-	-	1
Unspecified	9	10	10	7	10	9
Compaq	24	26	29	22	22	27
386 Desk Pro	8	8	9	10	2	10
Portable III 286	4	4	2	6	2	3
Others	*	*	1	-	2	-
Unspecified	13	14	18	8	18	16
Toshiba	5	5	6	11	2	2
1200	1	1	1	2	-	-
Others	2	2	1	5	-	-
Unspecified	3	2	4	4	2	2

(Continued)

MAKES AND MODELS OF PCs THAT MIGHT BE ACQUIRED
BY COMPANY/DIVISION/DEPARTMENT IN THE NEXT 12 MONTHS

(Among Those Likely To Consider Acquiring A PC
In The Next 12 Months)

(Continued)

	Total	PC Software Decision Makers	Top Management	Company Size: 1,000 Or More	Company Size: 100-999	Company Size: Under 100
	(270)	(239)	(139)	(104)	(67)	(96)
Epson	4%	4%	5%	3%	5%	5%
Equity	2	2	1	1	3	1
Others	*	*	1	-	-	1
Unspecified	2	2	3	2	2	3
Leading Edge	4	4	4	4	3	6
Others	*	-	-	-	-	1
Unspecified	4	4	4	4	3	5
NEC	4	4	3	6	3	2
Others	1	1	1	2	2	-
Unspecified	3	3	2	4	2	2
Wang	4	4	4	5	9	-
Others	1	1	1	2	-	-
Unspecified	3	3	2	3	9	0
Wyse	4	5	5	2	6	5
2108	1	1	1	-	2	1
286	*	*	1	1	-	-
386	*	*	-	-	2	-
Unspecified	3	3	3	1	3	4
AST	3	4	4	4	3	3
Premium 286	2	2	1	2	2	1
Others	*	*	1	1	-	-
Unspecified	2	2	2	1	2	2
AT&T	3	3	3	2	3	4
Others	*	-	-	1	-	-
Unspecified	3	3	3	1	3	4

(Continued)

MAKES AND MODELS OF PCs THAT MIGHT BE ACQUIRED
BY COMPANY/DIVISION/DEPARTMENT IN THE NEXT 12 MONTHS

(Among Those Likely To Consider Acquiring A PC
In The Next 12 Months)

(Continued)

	Total	PC Software Decision Makers	Top Management	Company Size: 1,000 Or More	Company Size: 100-999	Company Size: Under 100
	(270)	(239)	(139)	(104)	(67)	(96)
All Others						
Zenith	3%	3%	2%	2%	5%	2%
Commodore	2	2	2	2	-	2
Tandy/Radio Shack	2	2	2	-	3	3
Texas Instruments	1	1	1	-	-	2
Hewlett-Packard	1	1	1	-	3	1
Packard Bell	*	*	1	-	-	1
Others	10	12	14	7	9	17
No answer	9	8	8	7	8	11

* Less than 0.5 percent

LIKELIHOOD OF COMPANY/DIVISION/DEPARTMENT
ACQUIRING OS/2 OPERATING SYSTEMS
FOR USE AT WORK IN THE NEXT 6 MONTHS

(Among Those Who Use Or Expect To Buy An IBM or IBM-Compatible PC)

	Use Or Expect To Buy An IBM PC (343)
Likely to acquire OS/2 system	18%
Very likely	10
Fairly likely	8
Not likely to acquire OS/2 system	39
Not too likely	19
Not at all likely	20
Already have OS/2	4
No idea at all	33
No answer	6

TYPES OF PERIPHERALS AND ENHANCEMENTS PERSONALLY USE NOW
OR THAT MIGHT BE ACQUIRED FOR PERSONAL USE AT WORK IN THE NEXT 6 MONTHS

(Among Those Who Personally Use A PC)

	Personally Use Now (347)	Might Be Acquired For Own Use at Work In The Next 6 Months (347)	Personally Use Now Or Might Be Acquired For Own Use at Work In The Next 6 Months (347)
Printer	90%	22%	92%
Dot matrix printer	64	5	66
Laser printer	46	16	57
Ink jet printer	17	5	21
Hard disk drive	70	6	73
Color monitor	51	12	60
Modem	48	12	57
External modem	32	8	38
Internal modem	26	7	32
Expanded memory board (allowing more than 640K)	36	12	45
Graphics board	35	10	42
Local area network (LAN) board	17	10	26
Plotter	14	6	20
FAX board	6	8	14
Scanner	6	7	12
Other	4	1	5
None of these	2	8	2
No answer	4	44	3

TYPES OF PERIPHERALS AND ENHANCEMENTS
PERSONALLY USE AT WORK WITH PCs

(Among Those Who Personally Use A PC)

	Total	PC Software Decision Makers	Top Management	Company Size 1,000 Or More	Company Size 100-999	Company Size Under 100
	(347)	(276)	(151)	(141)	(78)	(119)
Printer	90%	93%	93%	91%	86%	93%
Dot matrix printer	64	67	76	60	58	76
Laser printer	46	51	46	51	50	39
Ink jet printer	17	16	13	23	12	13
Hard disk drive	70	76	74	70	72	71
Color monitor	51	55	52	60	51	42
Modem	48	51	58	48	49	50
External modem	32	33	36	36	30	31
Internal modem	26	29	33	22	32	29
Expanded memory board (allowing more than 640K)	36	41	44	35	35	39
Graphics board	35	39	39	36	44	29
Local area network (LAN) board	17	19	20	22	17	12
Plotter	14	16	9	24	10	6
FAX board	6	6	7	6	5	8
Scanner	6	7	7	4	6	8
Other	4	5	6	2	5	6
None of these	2	-	1	1	4	1
No answer	4	3	3	4	1	3

TYPES OF PERIPHERALS AND ENHANCEMENTS
THAT MIGHT BE ACQUIRED FOR PERSONAL USE AT WORK
IN THE NEXT 6 MONTHS

(Among Those Who Personally Use A PC)

	Total	PC Software Decision Makers	Top Management	Company Size: 1,000 Or More	Company Size: 100-999	Company Size: Under 100
	(347)	(276)	(151)	(141)	(78)	(119)
Might be acquired for personal use at work	48%	53%	57%	44%	35%	62%
Printer	22	24	30	21	15	27
Laser printer	16	18	23	17	13	19
Dot matrix printer	5	5	6	4	5	7
Ink jet printer	5	5	5	5	4	5
Expanded memory board (allowing more than 640k)	12	13	12	11	8	18
Modem	12	14	12	11	5	19
External modem	8	9	9	7	1	13
Internal modem	7	9	5	9	4	8
Color monitor	12	13	14	10	8	18
Local area network (LAN) board	10	12	12	11	10	10
Graphics board	10	11	11	7	12	12
FAX board	8	10	11	6	6	13
Scanner	7	8	9	5	9	9
Hard disk drive	6	7	6	6	4	7
Plotter	6	7	7	6	5	8
Other	1	1	1	1	-	2
None of these	8	7	6	8	12	8
No answer	44	40	37	48	53	30

TYPES OF PERIPHERALS AND ENHANCEMENTS
THAT SUBORDINATES USE NOW
OR MIGHT BE ACQUIRED FOR SUBORDINATES IN THE NEXT 6 MONTHS

(Among Those Who Manage PC Users)

	Subordinates Use Now	Might Be Acquired For Subordinates In The Next 6 Months	Subordinates Use Now Or Might Be Acquired For Subordinates In The Next 6 Months
	(275)	(275)	(275)
Printer	86%	23%	88%
Dot matrix printer	68	7	68
Laser printer	48	19	60
Ink jet printer	15	6	20
Hard disk drive	72	11	73
Modem	52	12	58
External modem	40	8	45
Internal modem	31	7	36
Color monitor	48	14	56
Expanded memory board (allowing more than 640K)	38	9	42
Graphics board	36	11	43
Local area network (LAN) board	23	12	32
Plotter	19	7	24
Scanner	8	6	13
FAX board	6	7	13
Other	3	1	3
None of these	2	9	2
No answer	10	50	8

TYPES OF PERIPHERALS AND ENHANCEMENTS
THAT SUBORDINATES USE WITH PCs AT WORK

(Among Those Who Manage PC Users)

	Total	PC Software Decision Makers	Top Management	Company Size: 1,000 Or More	Company Size: 100-999	Company Size: Under 100
	(275)	(243)	(153)	(111)	(61)†	(99)
Printer	86	88	86	90	79	86
Dot matrix printer	68	71	73	69	57	73
Laser printer	48	49	47	62	44	36
Ink jet printer	15	16	14	23	13	9
Hard disk drive	72	76	72	77	64	71
Modem	52	54	58	56	46	51
External modem	40	42	44	47	30	37
Internal modem	31	33	37	33	38	25
Color monitor	48	51	47	61	44	37
Expanded memory board (allowing more than 640K)	38	40	39	44	33	31
Graphics board	36	38	39	39	44	29
Local area network (LAN) board	23	24	27	31	21	15
Plotter	19	19	17	32	15	6
Scanner	8	8	10	10	5	8
FAX board	6	5	6	7	2	6
Other	3	3	4	1	7	2
None of these	1	1	2	-	5	1
No answer	10	8	9	8	13	8

† Sample size is very small, interpret cautiously.

TYPES OF PERIPHERALS AND ENHANCEMENTS
THAT MIGHT BE ACQUIRED FOR SUBORDINATES IN THE NEXT 6 MONTHS

(Among Those Who Manage PC Users)

	Total	PC Software Decision Makers	Top Management	Company Size: 1,000 Or More	Company Size: 100-999	Company Size: Under 100
	(275)	(243)	(153)	(111)	(61)	(99)
Might be acquired for subordinates	41%	44%	45%	41%	38%	44%
Printer	23	25	27	23	21	24
Laser printer	19	21	22	19	21	18
Dot matrix printer	7	7	8	5	7	8
Ink jet printer	6	7	7	6	7	6
Color monitor	14	14	14	14	13	13
Local area network (LAN) board	12	13	14	13	12	13
Modem	12	13	13	12	12	13
External modem	8	8	11	5	8	11
Internal modem	7	8	5	9	7	6
Hard disk drive	11	11	13	9	8	13
Graphics board	11	11	9	11	12	9
Expanded memory board (allowing more than 640K)	9	10	10	7	10	10
Plotter	7	8	7	8	7	6
FAX board	7	8	10	5	8	8
Scanner	6	6	7	5	12	3
Other	1	1	1	1	2	1
None of these	9	8	8	5	13	10
No answer	50	48	47	54	49	46

WHETHER COMPANY/DIVISION/DEPARTMENT
HAS A LOCAL AREA NETWORK (LAN) SYSTEM

(Among Those Who Manage PC Users)

	Total	PC Software Decision Makers	Top Management	Company Size: 1,000 Or More	Company Size: 100-999	Company Size: Under 100
	(275)	(243)	(153)	(111)	(61)†	(99)
Yes, have a LAN system	37%	37%	38%	47%	36%	26%
No, do not have a LAN system	54	56	54	44	54	65
No idea at all	6	4	5	6	5	5
No answer	3	3	3	3	5	4

† Sample size is very small, interpret cautiously.

LIKELIHOOD OF COMPANY/DIVISION/DEPARTMENT
ACQUIRING A LOCAL AREA NETWORK (LAN) SYSTEM
IN THE NEXT 6 MONTHS

(Among Those Who Manage PC Users
And Who Do Not Have A LAN System)

	Total	PC Software Decision Makers	Top Management	Company Size: 1,000 Or More	Company Size: 100-999	Company Size: Under 100
	(174)	(153)	(94)	(59)†	(39)†	(73)
Likely	20%	22%	19%	14%	31%	19%
Very likely	9	10	7	9	13	7
Fairly likely	11	12	12	5	18	12
Not likely	60	62	70	59	49	69
Not too likely	21	23	22	23	21	19
Not at all likely	39	39	48	36	28	50
No idea at all	12	10	7	20	12	5
No answer	8	6	4	7	8	7

† Sample size is very small, interpret cautiously.

TYPES OF PC SOFTWARE USE AT WORK

(Among Those Who Personally Use A PC Or Manage PC Users)

	Personally Use At Work (347)	Subordinates Use At Work (275)
Word processing	74%	83%
Spreadsheet	64	67
Graphics	33	36
Communications	31	31
Relational data base management	28	35
Accounting	25	38
General business	22	19
Time and calendar organizer	21	21
Flat file data base management	18	19
Desktop publishing	14	20
Project management	12	15
Integrated/multifunction	11	15
Presentation package	11	16
CAD/CAM	5	8
Other	7	7
None of these	2	2
No answer	4	6

TYPES OF PC SOFTWARE PERSONALLY USE AT WORK

(Among Those Who Personally Use A PC)

	Total	PC Software Decision Makers	Top Management	Company Size: 1,000 Or More	Company Size: 100-999	Company Size: Under 100
	(347)	(276)	(151)	(141)	(78)	(119)
Word processing	74%	75%	73%	75%	76%	73%
Spreadsheet	64	68	66	69	69	56
Graphics	33	36	30	40	35	25
Communications	31	34	33	37	33	25
Relational data base management	28	30	27	28	28	28
Accounting	25	25	32	12	24	40
General business	22	21	27	16	21	30
Time and calendar organizer	21	22	21	23	19	20
Flat file data base management	18	18	19	18	15	19
Desktop publishing	14	14	13	11	17	16
Project management	12	13	13	13	12	12
Integrated/multi-function	11	12	15	11	10	13
Presentation package	11	10	8	20	5	5
CAD/CAM	5	5	6	4	-	10
Other	7	8	7	7	5	9
None of these	2	1	3	1	4	3
No answer	4	3	5	3	3	4

TYPES OF PC SOFTWARE USED BY SUBORDINATES AT WORK

(Among Those Who Manage PC Users)

	Total (275)	PC Software Decision Makers (243)	Top Management (153)	Company Size: 1,000 Or More (111)	Company Size: 100-999 (61)†	Company Size: Under 100 (99)
Word processing	83%	84%	84%	88%	79%	80%
Spreadsheet	67	68	70	75	69	56
Accounting	38	39	50	23	39	55
Graphics	36	36	36	53	30	20
Relational data base management	35	37	38	39	34	32
Communications	31	32	32	39	28	23
Time and calendar organizer	21	19	20	29	21	11
Desktop publishing	20	19	23	19	25	18
General business	19	19	24	18	18	22
Flat file data base management	19	19	20	21	13	19
Presentation package	16	15	15	25	13	7
Integrated/multifunction	15	17	18	17	16	12
Project management	15	14	14	17	20	7
CAD/CAM	8	9	10	13	2	8
Other	7	7	7	5	7	10
None of these	2	1	2	1	2	2
No answer	6	5	6	4	8	7

† Sample size is very small, interpret cautiously.

TYPES OF PC SOFTWARE THAT MIGHT BE ACQUIRED
BY COMPANY/DIVISION/DEPARTMENT IN THE NEXT 6 MONTHS

(Among Those Who Personally Use PCs, Manage Those Who Use PCs
Or Are Likely To Buy PC Software In The Next 6 Months)

	Total	PC Software Decision Makers	Top Management	Company Size 1,000 Or More	Company Size 100-999	Company Size Under 100
	(435)	(351)	(209)	(169)	(100)	(155)
Might acquire software	39%	46%	41%	35%	40%	42%
Desktop publishing	16%	19%	19%	15%	13%	19%
Graphics	13	16	11	17	11	11
Presentation package	12	14	12	15	9	9
Relational data base management	12	15	12	13	14	11
Word processing	10	11	10	11	8	10
Spreadsheet	10	12	11	11	9	12
Project management	9	10	8	11	9	7
Accounting	8	9	12	5	5	14
Time and calendar organizer	8	10	8	10	6	8
Communications	8	9	6	10	9	5
Flat file data base management	6	7	5	6	6	5
CAD/CAM	4	5	2	6	5	1
General business	4	5	5	4	2	7
Integrated/multifunction	4	4	2	6	4	1
Other	2	3	3	1	2	4
None of these	9	7	9	7	11	10
No answer	52	47	50	58	49	48

AWARENESS OF PARTICULAR PC SOFTWARE PROGRAMS

(Among Those Who Personally Use PCs Or Manage PC Users)

	Total	PC Software Decision Makers	Top Management	Company Size 1,000 Or More	Company Size 100-999	Company Size Under 100
	(416)	(332)	(195)	(165)	(95)	(145)
dBASE III	77%	81%	76%	84%	77%	70%
1-2-3	77	80	75	86	74	70
WordStar	72	76	73	70	74	74
WordPerfect	71	74	72	70	78	68
Symphony	62	67	61	72	61	53
SuperCalc	51	53	55	53	50	51
DisplayWrite	46	49	45	53	42	43
AppleWorks	45	46	44	46	45	46
MultiMate	45	50	44	53	48	37
MultiPlan	44	46	45	50	46	37
Excel	42	44	43	43	46	39
Windows	37	40	38	38	37	37
MacDraw	33	34	35	36	32	32
Harvard Graphics	29	32	29	31	33	25
Pagemaker	27	30	29	28	28	28
PFS:Professional Write	27	29	27	26	27	28
Quattro	27	30	30	28	28	26
Word	26	28	27	26	26	28
Framework	25	26	26	27	22	25
MacProject	21	23	21	24	23	19
PFS:First Publisher	19	21	19	18	22	19
Paradox	18	21	17	19	14	19
Chart-Master	17	20	15	24	13	13
Ventura Publisher	17	20	20	13	18	22
Works	13	14	10	17	14	10
Cricket	10	10	8	10	11	10
RapidFile	8	7	8	6	10	9
Silverado	8	9	9	6	7	11
MasterGraphics	6	6	6	7	6	6
Smartform	6	7	7	5	7	8
ACCPAC	4	4	3	3	4	4
Power Point	4	4	3	7	2	2
Sales Generator Plus	3	3	4	2	3	4
SuperProject Expert	3	3	2	2	3	3
None of these	3	2	5	2	4	5
No answer	3	2	2	2	1	3

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

Software Program	Manufacturer	Correct Association	Incorrect Association	Don't Know	Correct Minus Incorrect Association	Number Who Heard Of PC Software Program
1-2-3	Lotus Development Corporation	81%	3%	16%	+78%	(336)
WORD	Microsoft Corp.	59	3	38	+56	(113)
SUPERPROJECT EXPERT	Computer Assoc. International	50	-	50	+50	(12)†
SYMPHONY	Lotus Development Corporation	54	4	42	+50	(271)
WORKS	Microsoft Corp.	49	-	51	+49	(57)†
CRICKET	Cricket Software	45	2	53	+43	(42)†
VENTURA PUBLISHER	Xerox Corp.	46	4	50	+42	(72)
WINDOWS	Microsoft Corp.	44	3	53	+41	(162)
WORDPERFECT	WordPerfect Corp.	47	9	44	+38	(315)
POWERPOINT	Microsoft Corp.	35	-	65	+35	(17)†
PAGEMAKER	Aldus Corp.	39	6	55	+33	(118)
DISPLAYWRITE	IBM	31	2	67	+29	(198)
dBASE III	Ashton-Tate	39	12	49	+27	(337)
EXCEL	Microsoft Corp.	34	7	59	+27	(184)
QUATTRO	Borland Int'l.	31	5	64	+26	(115)
PARADOX	Ansa Software or Borland Int'l.	26	5	69	+21	(75)
FRAMEWORK	Ashton-Tate	30	11	59	+19	(104)
PFS: FIRST PUBLISHER	Software Publishing	30	12	58	+18	(83)
RAPIDFILE	Ashton-Tate	24	6	70	+18	(33)†

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

(Continued)

Software Program	Manufacturer	Correct Association	Incorrect Association	Don't Know	Correct Minus Incorrect Association	Number Who Heard Of PC Software Program
ACCPAC	Computer Assoc. Corporation	31%	19%	50%	+12%	(16)†
PFS: PROFESSIONAL WRITE	Software Publ. Corporation	24	12	64	+12	(117)
CHART-MASTER	Ashton-Tate	10	2	88	+8	(72)
MACDRAW	Claris Corp.	20	12	68	+8	(143)
MASTER GRAPHICS	Ashton-Tate	8	-	92	+8	(26)†
MULTIPLAN	Microsoft Corp.	18	11	71	+7	(187)
MACPROJECT	Claris Corp.	21	16	63	+5	(90)
HARVARD GRAPHICS	Software Publ. Corporation	12	9	79	+3	(125)
SALES GENERATOR PLUS	Supersell Software Inc.	-	-	100	-	(14)†
SMARTFORM	Claris Corporation	4	4	92	-	(28)†
SILVERADO	Computer Assoc. International	9	11	80	-2	(35)†
APPLEWORKS	Claris Corporation	9	14	77	-5	(202)
MULTIMATE	Ashton-Tate	13	18	69	-5	(193)
WORDSTAR	MicroPro	13	19	68	-6	(319)
SUPERCALC	Computer Assoc. International	7	15	78	-8	(223)

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

ACCPAC

	Total Aware (16)†	PC Software Decision Makers (14)†	Top Management (6)†	Company Size 1,000 Or More (5)†	Company Size 100-999 (5)†	Company Size Under 100 (6)†
Believe ACCPAC Is Offered By:						
Computer Associates International	31%	36%	66%	-%	20%	66%
Incorrect association	19	21	17	20	20	17
Aldus Corporation	7	7	17	20	-	-
IBM	6	7	-	-	20	-
Software Publishing Corporation	6	7	-	-	-	17
Don't know	50	43	17	80	60	17

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

APPLEWORKS

	Total Aware (202)	PC Software Decision Makers (166)	Top Management (95)	Company Size 1,000 Or More (77)	100-999 (47)†	Under 100 (74)
Believe APPLEWORKS Is Offered By:						
Claris Corporation	9%	10%	8%	10%	9%	10%
Incorrect association	14	13	15	10	15	18
Microsoft Corporation	7	7	8	6	11	8
Aldus Corporation	1	1	1	1	-	2
Cricket Software	1	1	-	-	2	-
IBM	1	1	-	-	2	1
Lotus Development Corporation	1	-	-	-	-	1
Software Publishing Corporation	1	1	2	-	-	3
Xerox Corporation	*	*	1	1	-	-
Don't know	77	77	77	80	76	72

* Less than 0.5 percent

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

CHART-MASTER

	Total Aware (72)	PC Software Decision Makers (68)†	Top Management (31)†	Company Size 1,000 Or More (39)†	100-999 (14)†	Under 100 (19)†
Believe CHART-MASTER Is Offered By:						
Ashton-Tate	10%	10%	16%	8%	-%	21%
Incorrect association	2	3	3	5	-	-
Borland International	1	1	3	3	-	-
Microsoft Corporation	1	2	-	2	-	-
Don't know	88	87	81	87	100	79

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

CRICKET

	Total Aware (42)†	PC Software Decision Makers (34)†	Top Management (15)†	Company Size 1,000 Or More (17)†	100-999 (10)†	Under 100 (15)†
Believe CRICKET Is Offered By:						
Cricket Software	45%	47%	60%	53%	20%	53%
Incorrect association	2	3	-	6	-	-
Borland International	2	3	-	6	-	-
Don't know	53	50	40	41	80	47

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

dBASE III

	Total Aware (337)	PC Software Decision Makers (284)	Top Management (157)	Company Size 1,000 Or More (141)	100-999 (78)	Under 100 (109)
Believe dBASE III Is Offered By:						
Ashton-Tate	39%	42%	38%	38%	35%	45%
Incorrect association	12	11	10	13	14	7
IBM	5	5	5	6	4	4
Microsoft Corporation	4	4	4	3	5	2
Ansa Software	1	1	-	1	-	-
Lotus Development Corporation	1	1	1	-	4	1
Xerox Corporation	1	-	-	1	-	-
Borland International	*	*	-	1	-	-
Claris Corporation	*	*	-	-	1	-
Computer Associates International	*	-	-	1	-	-
Don't know	49	47	52	49	51	48

* Less than 0.5 percent

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

DISPLAYWRITE

	Total Aware (198)	PC Software Decision Makers (167)	Top Management (90)	Company Size: 1,000 Or More (88)	Company Size: 100-999 (42)†	Company Size: Under 100 (65)†
Believe DISPLAYWRITE Is Offered By:						
IBM	31%	34%	26%	40%	21%	26%
Incorrect association	2	2	2	1	5	-
Ashton-Tate	1	1	1	1	-	-
Computer Associates International	1	1	-	-	3	-
Xerox Corporation	*	*	1	-	2	-
Don't know	67	64	72	59	74	74

* Less than 0.5 percent

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

EXCEL

	Total Aware (184)	PC Software Decision Makers (155)	Top Management (87)	Company Size 1,000 Or More (72)	100-999 (47)†	Under 100 (60)†
Believe EXCEL Is Offered By:						
Microsoft Corporation	34%	34%	35%	33%	23%	42%
Incorrect association	7	5	5	13	-	5
Aldus Corporation	1	1	-	2	-	-
Ashton-Tate	1	1	2	4	-	-
IBM	1	-	-	4	-	-
Lotus Development Corporation	1	1	1	2	-	2
MicroPro	1	1	1	-	-	2
Supersell Software Inc.	1	1	1	1	-	-
Xerox Corporation	1	*	-	-	-	1
Don't know	59	61	60	54	77	53

* Less than 0.5 percent

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

FRAMEWORK

	Total Aware (104)	PC Software Decision Makers (88)	Top Management (51)†	Company Size 1,000 Or More (45)†	100-999 (22)†	Under 100 (36)†
Believe FRAMEWORK Is Offered By:						
Ashton-Tate	30%	32%	31%	20%	41%	36%
Incorrect association	11	10	12	9	9	14
Borland International	1	1	2	-	-	3
IBM	2	1	2	2	5	-
Lotus Development Corporation	7	8	6	7	4	8
Microsoft Corporation	1	-	2	-	-	3
Don't know	59	58	57	71	50	50

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

HARVARD GRAPHICS

	Total Aware (125)	PC Software Decision Makers (109)	Top Management (59)†	Company Size 1,000 Or More (52)†	Company Size 100-999† (34)†	Company Size Under 100 (36)†
Believe HARVARD GRAPHICS Is Offered By:						
Software Publishing Corporation	12%	12%	14%	12%	9%	14%
Incorrect association	9	8	10	8	9	11
IBM	2	1	2	2	3	-
Ashton-Tate	1	2	-	-	3	2
Borland International	1	1	1	4	-	-
Computer Associates International	1	-	-	2	-	-
Cricket Software	1	1	1	-	-	3
Lotus Development Corporation	1	1	2	-	-	3
MicroPro	1	1	2	-	-	3
Microsoft Corporation	1	1	2	-	3	-
Don't know	79	80	76	80	82	75

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

MACDRAW

	Total Aware (143)	PC Software Decision Makers (120)	Top Management (71)	Company Size: 1,000 Or More (62)†	Company Size: 100-999 (31)†	Company Size: Under 100 (50)†
Believe MACDRAW Is Offered By:						
Claris Corporation	20%	20%	20%	23%	13%	22%
Incorrect association	12	10	8	11	13	12
Microsoft Corporation	6	5	6	7	7	8
Aldus Corporation	1	1	1	-	-	2
Ashton-Tate	1	-	-	2	-	-
Cricket Software	1	2	1	-	3	2
IBM	1	-	-	1	-	-
Lotus Development Corporation	1	1	-	1	-	-
MicroPro	1	1	-	-	3	-
Don't know	68	70	72	66	74	66

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

MACPROJECT

	Total Aware (90)	PC Software Decision Makers (77)	Top Management (42)†	Company Size: 1,000 Or More (40)†	Company Size: 100-999 (22)†	Company Size: Under 100 (28)†
Believe MACPROJECT Is Offered By:						
Claris Corporation	21%	21%	21%	25%	9%	25%
Incorrect association	16	14	12	13	14	21
Microsoft Corporation	12	9	7	10	9	14
Cricket Software	2	3	2	-	5	4
Aldus Corporation	1	1	3	-	-	3
Lotus Development Corporation	1	1	-	3	-	-
Don't know	63	65	67	62	77	54

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

MASTER GRAPHICS

	Total Aware (26)†	PC Software Decision Makers (20)†	Top Management (11)†	Company Size 1,000 Or More (11)†	100-999 (6)†	Under 100 (9)†
Believe MASTER GRAPHICS Is Offered By:						
Ashton-Tate	8%	10%	18%	9%	-%	11%
Incorrect association	-	-	-	-	-	-
Don't know	92	90	82	91	100	89

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

MULTIMATE

	Total Aware (193)	PC Software Decision Makers (169)	Top Management (87)	Company Size 1,000 Or More (89)	100-999 (47)†	Under 100 (54)†
Believe MULTIMATE Is Offered By:						
Ashton-Tate	13%	14%	16%	10%	9%	22%
Incorrect association	18	18	12	24	11	11
IBM	7	6	4	8	5	4
Microsoft Corporation	7	7	6	11	2	5
MicroPro	2	3	1	1	4	2
Computer Associates International	1	1	1	2	-	-
Lotus Development Corporation	1	1	-	2	-	-
Don't know	69	68	72	66	80	67

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

MULTIPLAN

	Total Aware (187)	PC Software Decision Makers (157)	Top Management (89)	Company Size: 1,000 Or More (85)	Company Size: 100-999 (44)†	Company Size: Under 100 (56)†
Believe MULTIPLAN Is Offered By:						
Microsoft Corporation	18%	18%	20%	20%	9%	21%
Incorrect association	11	12	9	13	7	9
Ashton-Tate	3	4	2	5	2	2
IBM	3	3	2	4	-	3
MicroPro	3	3	4	2	5	2
Computer Associates International	1	1	1	1	-	-
Lotus Development Corporation	1	1	-	1	-	2
Don't know	71	70	71	67	84	70

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

1-2-3

	Total Aware (336)	PC Software Decision Makers (280)	Top Management (153)	Company Size 1,000 Or More (145)	100-999 (73)	Under 100 (111)
Believe 1-2-3 Is Offered By:						
Lotus Development Corporation	81%	81%	82%	82%	75%	83%
Incorrect association	3	3	4	1	4	5
Ashton-Tate	1	1	1	1	-	2
IBM	1	1	1	-	3	1
Microsoft Corporation	1	1	1	-	1	1
Borland International	*	*	1	-	-	1
Don't know	16	16	14	17	21	12

* Less than 0.5 percent

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

PAGEMAKER

	Total Aware (118)	PC Software Decision Makers (102)	Top Management (57)†	Company Size 1,000 Or More (47)†	100-999 (29)†	Under 100 (42)†
Believe PAGEMAKER Is Offered By:						
Aldus Corporation	39%	41%	39%	34%	38%	45%
Incorrect association	6	4	4	6	7	5
Microsoft Corporation	2	-	2	-	4	3
Ansa Software	1	1	2	-	-	2
Ashton-Tate	1	1	-	2	-	-
Claris Corporation	1	1	-	-	3	-
IBM	1	-	-	2	-	-
Software Publishing Corporation	*	1	-	2	-	-
Don't know	55	55	57	60	55	50

* Less than 0.5 percent

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

PARADOX

	Total Aware (75)	PC Software Decision Makers (68)†	Top Management (34)†	Company Size 1,000 Or More (32)†	Company Size 100-999 (13)†	Company Size Under 100 (27)†
Believe PARADOX Is Offered By:						
Ansa Software	15%	16%	18%	13%	23%	15%
Borland International	11	10	9	6	8	18
Incorrect association	5	6	3	9	-	4
Lotus Development Corporation	3	3	-	3	-	4
Ashton-Tate	1	1	3	3	-	-
IBM	1	2	-	3	-	-
Don't know	69	68	70	72	69	63

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

PFS: FIRST PUBLISHER

	Total Aware (83)	PC Software Decision Makers (74)	Top Management (39)†	Company Size: 1,000 Or More (29)†	Company Size: 100-999 (21)†	Company Size: Under 100 (30)†
Believe PFS: FIRST PUBLISHER Is Offered By:						
Software Publishing Corporation	30%	31%	28%	35%	24%	30%
Incorrect association	12	12	15	10	10	13
IBM	7	7	9	10	5	7
Ashton-Tate	3	3	-	-	-	3
Borland International	1	1	3	-	-	3
Microsoft Corporation	1	1	3	-	5	-
Don't know	58	57	57	55	66	57

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

PFS:PROFESSIONAL WRITE

	Total Aware (117)	PC Software Decision Makers (101)	Top Management (56)†	Company Size: 1,000 Or More (43)†	Company Size: 100-999 (27)†	Company Size: Under 100 (43)†
Believe PFS: PROFESSIONAL WRITE Is Offered By:						
Software Publishing Corporation	24%	26%	23%	28%	19%	23%
Incorrect association	12	11	13	14	11	9
IBM	6	6	7	9	7	5
Ashton-Tate	2	2	-	-	-	2
WordPerfect Corporation	2	1	2	5	-	-
Borland International	1	1	2	-	-	2
Microsoft Corporation	1	1	2	-	4	-
Don't know	64	63	64	58	70	68

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

POWER POINT

	Total Aware (17)†	PC Software Decision Makers (13)†	Top Management (6)†	Company Size 1,000 Or More (12)†	100-999 (2)†	Under 100 (3)†
Believe POWER POINT Is Offered By:						
Microsoft Corporation	35%	39%	17%	42%	-%	33%
Incorrect association	-	-	-	-	-	-
Don't know	65	61	83	58	100	67

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

QUATTRO

	Total Aware (115)	PC Software Decision Makers (105)	Top Management (61)†	Company Size 1,000 Or More (47)†	Company Size 100-999 (27)†	Company Size Under 100 (40)†
Believe QUATTRO Is Offered By:						
Borland International	31%	33%	34%	26%	30%	40%
Incorrect association	5	3	5	4	7	3
Ashton-Tate	2	1	2	4	-	-
Microsoft Corporation	2	2	3	-	3	3
IBM	1	-	-	-	4	-
Don't know	64	64	61	70	63	57

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

RAPIDFILE

	Total Aware (33)†	PC Software Decision Makers (24)†	Top Management (17)†	Company Size 1,000 Or More (10)†	Company Size 100-999 (9)†	Company Size Under 100 (14)†
Believe RAPIDFILE Is Offered By:						
Ashton-Tate	24%	29%	35%	-%	22%	43%
Incorrect association	6	8	-	-	11	7
IBM	3	4	-	-	11	-
Software Publishing Corporation	3	4	-	-	-	7
Don't know	70	63	65	100	67	50

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

SALES GENERATOR PLUS

	Total Aware (14)†	PC Software Decision Makers (11)†	Top Management (8)†	Company Size 1,000 Or More (4)†	100-999 (3)†	Under 100 (7)†
Believe SALES GENERATOR PLUS Is Offered By:						
Supersell Software Inc.	-%	-%	-%	-%	-%	-%
Incorrect association	-	-	-	-	-	-
Don't know	100	100	100	100	100	100

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

SILVERADO

	Total Aware (35)†	PC Software Decision Makers (31)†	Top Management (18)†	Company Size 1,000 Or More (11)†	100-999 (7)†	Under 100 (17)†
Believe SILVERADO Is Offered By:						
Computer Associates International	9%	7%	11%	9%	-%	12%
Incorrect association	11	13	6	18	14	6
IBM	5	7	6	9	14	-
Ashton-Tate	3	3	-	9	-	-
Xerox Corporation	3	3	-	-	-	6
Don't know	80	80	83	73	86	82

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

SMARTFORM

	Total Aware (28)†	PC Software Decision Makers (26)†	Top Management (14)†	Company Size 1,000 Or More (9)†	100-999 (8)†	Under 100 (11)†
Believe SMARTFORM Is Offered By:						
Claris Corporation	4%	4%	7%	11%	-%	-%
Incorrect association	4	4	-	11	-	-
IBM	4	4	-	11	-	-
Don't know	92	92	93	78	100	100

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

SUPERCALC

	Total Aware (223)	PC Software Decision Makers (188)	Top Management (113)	Company Size 1,000 Or More (91)	Company Size 100-999 (49)†	Company Size Under 100 (81)
Believe SUPERCALC Is Offered By:						
Computer Associates International	7%	7%	7%	8%	6%	7%
Incorrect association	15	15	13	19	6	15
Microsoft Corporation	6	5	2	7	2	5
IBM	2	3	2	3	-	3
Lotus Development Corporation	2	2	3	2	2	3
Supersell Software Inc.	2	1	2	1	-	2
MicroPro	1	2	2	2	2	-
Software Publishing Corporation	1	1	-	1	-	1
Xerox Corporation	1	1	-	2	-	-
Ashton-Tate	*	*	1	1	-	-
Claris Corporation	*	*	1	-	-	1
Don't know	78	78	80	73	88	75

* Less than 0.5 percent

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

SUPERPROJECT EXPERT

	Total Aware (12)†	PC Software Decision Makers (11)†	Top Management (4)†	Company Size 1,000 Or More (4)†	Company Size 100-999 (3)†	Company Size Under 100 (5)†
Believe SUPERPROJECT EXPERT Is Offered By:						
Computer Associates International	50%	54%	50%	50%	33%	60%
Incorrect association	-	-	-	-	-	-
Don't know	50	46	50	50	67	40

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

SYMPHONY

	Total Aware (271)	PC Software Decision Makers (234)	Top Management (124)	Company Size: 1,000 Or More (120)	Company Size: 100-999 (61)†	Company Size: Under 100 (84)
Believe SYMPHONY Is Offered By:						
Lotus Development Corporation	54%	55%	60%	54%	57%	54%
Incorrect association	4	4	3	3	4	3
IBM	2	2	1	2	2	1
Microsoft Corporation	2	2	2	1	2	2
Ashton-Tate	*	*	-	-	-	-
Don't know	42	41	37	43	39	43

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

VENTURA PUBLISHER

	Total Aware (72)	PC Software Decision Makers (67)†	Top Management (38)†	Company Size: 1,000 Or More (23)†	Company Size: 100-999 (17)†	Company Size: Under 100 (32)†
Believe VENTURA PUBLISHER Is Offered By:						
Xerox Corporation	46%	45%	45%	48%	35%	50%
Incorrect association	4	5	5	4	-	6
Aldus Corporation	2	2	3	-	-	3
Ashton-Tate	1	2	2	-	-	3
Borland International	1	1	-	4	-	-
Don't know	50	50	50	48	65	44

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

WINDOWS

	Total Aware (162)	PC Software Decision Makers (140)	Top Management (78)	Company Size 1,000 Or More (64)†	100-999 (38)†	Under 100 (56)†
Believe WINDOWS Is Offered By:						
Microsoft Corporation	44%	47%	46%	42%	40%	52%
Incorrect association	3	1	2	5	3	-
IBM	2	1	1	3	3	-
Lotus Development Corporation	1	-	1	2	-	-
Don't know	53	52	52	53	57	48

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

WORD

	Total Aware (113)	PC Software Decision Makers (97)	Top Management (55)†	Company Size 1,000 Or More (42)†	Company Size 100-999 (25)†	Company Size Under 100 (44)†
Believe WORD Is Offered By:						
Microsoft Corporation	59%	62%	60%	64%	44%	66%
Incorrect association	3	2	2	2	4	2
IBM	1	1	-	-	4	-
MicroPro	1	1	2	-	-	2
WordPerfect Corporation	1	-	-	2	-	-
Don't know	38	36	38	34	52	32

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

WORDPERFECT

	Total Aware (315)	PC Software Decision Makers (264)	Top Management (149)	Company Size 1,000 Or More (120)	100-999 (79)†	Under 100 (107)
Believe WORDPERFECT Is Offered By:						
WordPerfect Corporation	47%	48%	51%	46%	41%	55%
Incorrect association	9	8	7	8	11	8
IBM	5	3	2	3	7	2
Microsoft Corporation	4	3	3	3	3	3
Ansa Software	*	1	-	1	-	-
Ashton-Tate	*	1	1	-	-	1
Claris Corporation	*	*	-	-	-	1
Lotus Development Corporation	*	*	-	1	-	-
MicroPro	*	*	1	-	-	1
Xerox Corporation	*	-	-	-	1	-
Don't know	44	44	42	46	48	37

* Less than 0.5 percent

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

WORDSTAR

	Total Aware (319)	PC Software Decision Makers (273)	Top Management (154)	Company Size 1,000 Or More (118)	100-999 (76)	Under 100 (118)
Believe WORDSTAR Is Offered By:						
MicroPro	13%	12%	15%	9%	8%	19%
Incorrect association	19	19	18	16	13	25
Microsoft Corporation	6	8	8	5	8	8
WordPerfect Corporation	6	5	5	5	-	9
IBM	4	4	2	2	4	5
Lotus Development Corporation	1	1	-	2	-	-
Software Publishing Corporation	1	1	1	1	-	1
Xerox Corporation	1	*	1	1	1	1
Ashton-Tate	*	*	1	-	-	1
Don't know	68	69	67	75	79	56

* Less than 0.5 percent

† Sample size is very small, interpret cautiously.

PERCEIVED MANUFACTURERS OF VARIOUS PC SOFTWARE PROGRAMS

(Among Those Who Have Heard Of Each PC Software Program)

WORKS

	Total Aware (57)†	PC Software Decision Makers (47)†	Top Management (20)†	Company Size: 1,000 Or More (28)†	Company Size: 100-999 (14)†	Company Size: Under 100 (14)†
Believe WORKS Is Offered By:						
Microsoft Corporation	49%	49%	55%	50%	36%	57%
Incorrect association	-	-	-	-	-	-
Don't know	51	51	45	50	64	43

† Sample size is very small, interpret cautiously.

ROLE IN COMPANY'S PC SOFTWARE ACQUISITION DECISIONS

(Among PC Software Decision Makers)

	Total (368)	Top Management (194)	Company Size 1,000 Or More (128)	100-999 (87)	Under 100 (147)
Assessing the need	75%	71%	77%	77%	71%
Determining capabilities or features needed	57	54	52	55	61
Making final decision to acquire	50	62	32	39	71
Authorizing expenditures	46	62	39	36	59
Evaluating brands	42	38	35	37	52
Recommending or specifying brands	35	29	31	39	36
Recommending or specifying manufacturers	23	21	21	20	26
Recommending or specifying the source or outlet from which to acquire the software	22	24	11	15	35

PRESENCE OF EDP OR MIS DEPARTMENT

	FORTUNE Subscribers (528)
Company has EDP or MIS department	48%
Company does not have EDP or MIS department	45
No idea at all	5
No answer	2

PERCEIVED CHANGE IN EDP/MIS DEPARTMENT'S INVOLVEMENT
IN COMPANY'S PC SOFTWARE ACQUISITION DECISIONS

(Among Those Who Have EDP Or MIS Department)

	Total	PC Software Decision Makers	Top Management	Company Size: 1,000 Or More	Company Size: 100-999	Company Size: Under 100
	(252)	(209)	(97)	(146)	(67)†	(34)†
More involved now than 2-3 years ago	58%	59%	60%	55%	66%	56%
As involved now as 2-3 years ago	20	20	16	23	15	18
Less involved now than 2-3 years ago	10	11	14	10	9	12
No idea at all	9	8	6	10	6	9
No answer	4	2	4	3	5	6

† Sample size is very small, interpret cautiously.

COMPANY POLICIES REGARDING PC SOFTWARE ACQUISITION DECISIONS

(Among PC Software Decision Makers)

	Total (368)	Have EDP/MIS Department (209)	Do Not Have EDP/MIS Department (146)
Must have approval of department head	43%	55%	28%
New purchases must be compatible with existing equipment/ products	39	39	41
Must have approval of EDP/MIS department	25	43	-
Must document need to someone else	24	33	14
There are recommended brands, but you are allowed to buy others	16	24	5
Must have approval of business office	11	15	6
You can purchase up to a certain dollar amount without higher authorization	8	12	3
You are only allowed to buy particular brands	7	11	2
There is no policy	22	7	40
None of these	6	4	8
No answer	1	-	1

COMPANY POLICIES REGARDING PC SOFTWARE ACQUISITION DECISIONS

(Among PC Software Decision Makers)

	Total	Top Management	Company Size: 1,000 Or More	Company Size: 100-999	Company Size: Under 100
	(368)	(194)	(128)	(87)	(147)
Must have approval of department head	43%	33%	58%	58%	20%
New purchases must be compatible with existing equipment/ products	39	37	41	41	36
Must have approval of EDP/MIS department	25	23	41	24	11
Must document need to someone else	24	18	34	37	9
There are recommended brands, but you are allowed to buy others	16	12	29	20	2
Must have approval of business office	11	9	12	16	8
You can purchase up to a certain dollar amount without higher authorization	8	4	15	9	1
You are only allowed to buy particular brands	7	7	13	6	3
There is no policy	22	30	7	8	42
None of these	6	7	2	5	10
No answer	1	1	-	1	1

IMPORTANCE OF VARIOUS FACTORS
FOR PC SOFTWARE ACQUISITION DECISIONS

(Among PC Software Decision Makers)

% VERY IMPORTANT

	Total (368)	Top Management (194)	Company Size 1,000 Or More (128)	100-999 (87)	Under 100 (147)
Good reputation	54%	52%	51%	53%	55%
Can get phone support when needed	52	55	39	52	64
Easy to learn for "beginners"	48	49	43	51	50
Training is offered	39	42	27	48	44
Fast processing	38	37	38	37	38
Price	36	33	26	40	42
Low risk of obsolescence	35	33	26	36	40
Established manufacturer	34	36	29	32	37
Technologically sophisticated	28	24	31	28	25
Easy to learn for "advanced users"	28	24	35	21	25

RELATIVE IMPORTANCE
OF MANUFACTURER FAMILIARITY AND TECHNOLOGICAL SOPHISTICATION
IN CHOOSING PC SOFTWARE PROGRAMS

(Among PC Software Decision Makers)

	Total	Top Management	Company Size: 1,000 Or More	Company Size: 100-999	Company Size: Under 100
	(368)	(194)	(128)	(87)	(147)
The technological sophistication of the software program	53%	48%	60%	53%	48%
Being familiar with the software manufacturer	31	31	28	36	32
No idea at all	14	19	11	10	18
No answer	1	2	1	1	2

PREFERRED PROVIDER OF TRAINING FOR PC SOFTWARE PROGRAMS

(Among PC Software Decision Makers)

	Total (368)	Top Management (194)	Company Size 1,000 Or More (128)	100-999 (87)	Under 100 (147)
The manufacturer of the software	36%	37%	34%	39%	36%
The retail store or dealer from which the software was purchased	34	39	19	30	48
Company personnel	29	20	47	30	13
Other	3	5	3	3	3
No answer	1	2	-	2	1

ACQUISITION OF PC SOFTWARE PROGRAMS
IN THE PAST 12 MONTHS

(Among PC Software Decision Makers)

	Total	Top Management	Company Size: 1,000 Or More	Company Size: 100-999	Company Size: Under 100
	(368)	(194)	(128)	(87)	(147)
Obtained PC software in past 12 months	69%	69%	75%	64%	67%
Did not obtain PC software in past 12 months	31	31	25	36	33

IMPORTANCE OF VARIOUS CONSIDERATIONS
IN SELECTION OF PC SOFTWARE PROGRAMS
IN THE PAST 12 MONTHS

(Among PC Software Decision Makers Who
Acquired PC Software In The Past 12 Months)

RANKED FIRST, SECOND OR THIRD IN IMPORTANCE

	Total	Top Management	Company Size: 1,000 Or More	Company Size: 100-999	Company Size: Under 100
	(254)	(133)	(96)	(56)†	(98)
Product review	65%	62%	61%	68%	67%
Colleague's recommendation	49	44	43	55	51
Manufacturer's literature	48	42	47	45	52
EDP/MIS department's recommendation	31	26	43	45	13
Friend's recommendation	24	29	15	23	35
Salesperson's recommendation	16	19	10	13	21
Other	7	9	6	5	9

† Sample size is very small, interpret cautiously.

SOURCES FROM WHICH PC SOFTWARE WAS EVER ACQUIRED

(Among PC Software Decision Makers)

	Total	Top Management	Company Size: 1,000 Or More	Company Size: 100-999	Company Size: Under 100
	(368)	(194)	(128)	(87)	(147)
From computer retail store	64%	71%	58%	60%	71%
Direct from the manufacturer	54	49	60	59	46
From mail order catalogues	29	31	20	29	35
From software-only stores	28	30	27	30	27
From distributors	25	21	33	24	18
From consultants, value-added resellers or systems houses	25	31	15	30	29
From an 800 toll-free number	17	17	17	14	18
From company EDP/MIS department	15	7	31	9	3
From office supply stores	10	9	13	9	8
From mass merchandisers/ department stores	4	3	5	2	4
Never acquired software	2	3	1	-	5
None of these	2	3	1	2	3
No answer	6	5	9	9	1

SOURCES FROM WHICH ACQUIRE PC SOFTWARE MOST OFTEN

(Among PC Software Decision Makers)

	Total (368)	Top Management (194)	Company Size 1,000 Or More (128)	100-999 (87)	Under 100 (147)
From computer retail store	28%	30%	28%	25%	29%
Direct from the manufacturer	23	20	31	24	16
From distributors	11	8	13	16	7
From software-only stores	11	14	9	14	10
From consultants, value-added resellers or system houses	11	13	6	13	14
From mail order catalogues	10	10	8	8	13
From company EDP/MIS department	8	3	20	3	1
From an 800 toll-free number	6	5	5	2	9
From office supply stores	3	1	3	2	3
From mass merchandisers/ department stores	1	-	-	1	4
Never acquired software	1	3	1	1	3
None of these	2	3	1	1	4
No answer	23	23	23	23	25

SOURCES FROM WHICH PC SOFTWARE IS ACQUIRED

(Among PC Software Decision Makers)

	Ever Acquired From (368)	Acquired From Most Often (368)
From computer retail store	64%	28%
Direct from the manufacturer	54	23
From mail order catalogues	29	10
From software-only stores	28	11
From distributors	25	11
From consultants, value-added resellers or system houses	25	11
From an 800 toll-free number	17	6
From company EDP/MIS department	15	8
From office supply stores	10	3
From mass merchandisers/ department stores	4	1
Never acquired software	2	1
None of these	2	2
No answer	6	23

PC-RELATED ACTIVITIES DONE IN THE LAST 12 MONTHS

(Among PC Software Decision Makers)

	Total	Top Management	Company Size: 1,000 Or More	Company Size: 100-999	Company Size: Under 100
	(368)	(194)	(128)	(87)	(147)
Discussed personal computers with friends and/or colleagues	78%	75%	81%	79%	76%
Read articles about new computer developments in general business magazines	75	73	80	71	73
Read or looked at advertisements about PCs or PC products	73	70	78	72	69
Read PC-oriented magazines	58	58	57	55	59
Visited computer stores	48	49	45	47	49
Visited PC software stores	35	34	39	28	34
Read books about computers	33	28	34	36	32
Mailed away for more information about PCs or PC products	29	30	26	26	34
Used an 800 toll-free number for PC information	23	23	21	25	24
Attended computer conferences or trade shows	22	22	24	23	19
Took courses in computer literacy or applications	16	10	20	17	11
Took courses in a computer programming language	7	3	10	8	4
None of these	7	7	6	8	6

PC-ORIENTED MAGAZINES READ REGULARLY

(Among PC Software Decision Makers)

	Total (368)	Top Management (194)	Company Size 1,000 Or More (128)	100-999 (87)	Under 100 (147)
Read some PC-oriented magazines	45%	43%	47%	49%	39%
PC Magazine	17	19	16	14	21
Personal Computing	13	12	11	17	13
PC World	12	13	12	13	11
ComputerWorld	11	8	13	14	7
BYTE	10	9	9	7	11
PC Computing	9	9	7	13	8
PC Week	9	7	9	10	8
Lotus	8	9	11	6	6
InfoWorld	8	7	12	7	5
Datamation	7	6	8	8	4
Information Week	6	6	9	8	4
MacUser	5	5	6	6	5
MIS Week	5	4	7	7	3
MacWorld	5	4	7	2	4
Compute	3	1	3	3	3
Online Today	3	3	1	5	3
MacWeek	2	2	4	3	1
Family And Home Office Computing	1	1	1	2	1
Other	5	6	4	7	6
Do not read any PC-oriented magazines	55	57	53	51	61

USE OF PCs AT HOME

(Among Those Who Personally Use A PC Or Manage PC Users)

	Total	PC Software Decision Makers	Top Management	Company Size: 1,000 Or More	Company Size: 100-999	Company Size: Under 100
	(416)	(332)	(195)	(165)	(95)	(145)
Use a PC at home	52%	54%	59%	53%	48%	53%
For business reasons only	6	7	10	7	2	8
For personal reasons only	11	11	12	15	8	8
For both business and personal reasons	35	36	37	31	38	37
Do not use a PC at home	47	45	40	46	52	45
No answer	1	1	1	1	-	2

LIKELIHOOD OF CONSIDERING TO BUY A PC FOR HOME USE
OR UPGRADING HOME PC IN THE NEXT 12 MONTHS

(Among Those Who Personally Use A PC Or Manage PC Users)

	Total	PC Software Decision Makers	Top Management	Company Size: 1,000 Or More	Company Size: 100-999	Company Size: Under 100
	(416)	(332)	(195)	(165)	(95)	(145)
Likely	45%	48%	44%	43%	50%	43%
Very likely	21	23	21	18	25	20
Fairly likely	24	25	23	25	25	23
Not likely	48	47	50	48	45	51
Not too likely	21	21	21	22	23	19
Not at all likely	27	26	29	26	22	32
No idea at all	5	4	4	7	5	3
No answer	2	1	2	2	-	3

JOB TITLE OR POSITION

(Among Those Involved With PCs)

	Total (452)	PC Software Decision Makers (368)	Top Management (218)	Company Size: 1,000 Or More (170)	Company Size: 100-999 (104)	Company Size: Under 100 (166)
Top Management						
Chairman/President/CEO	16%	18%	34%	4%	12%	33%
Vice President	13	13	27	14	18	8
Owner/partner	10	11	21	2	2	24
Treasurer, Controller	6	7	12	4	6	8
Other Company Officer or Assistant Officer, General Manager	3	4	6	2	7	2
Other Professional/ Technical	13	11	-	17	14	10
Department Head	12	13	-	18	17	2
Other Manager or Supervisor	10	10	-	17	8	3
Salesperson, Broker, Agent, Representative	7	5	-	11	7	4
Trainee, Office Worker, Production Worker, etc.	4	2	-	4	5	2
Doctor, Lawyer	2	2	-	1	1	4
Government	3	3	-	5	3	-
Other	*	*	-	1	-	-
No answer	1	1	-	-	-	-

* Less than 0.5 percent

PRINCIPAL ACTIVITY OF COMPANY

(Among Those Involved With PCs)

	Total	PC Software Decision Makers	Top Management	Company Size 1,000 Or More	100-999	Under 100
	(452)	(368)	(218)	(170)	(104)	(166)
Service	67%	66%	71%	56%	71%	78%
Other Professional or Business Services	18	21	25	11	17	28
Banking, Finance Insurance	15	13	15	18	15	11
Wholesale or Retail Trade	9	9	12	2	9	16
Education	8	8	4	6	13	7
Transportation, Communications, Utilities	5	5	5	9	2	4
Government	5	4	2	7	6	1
Medical Services	4	4	4	3	4	6
Real Estate	3	2	4	-	5	5
Industrial	30	31	27	42	28	20
Manufacturing, Processing, Publishing	24	24	21	36	24	12
Construction, Engineering	4	5	5	4	3	7
Mining, Oil or Gas Extractions	2	2	1	2	1	1
Other	1	1	1	1	1	1
No answer	2	2	1	1	-	1

PRINCIPAL FUNCTION OF DEPARTMENT OR DIVISION

(Among Those Involved With PCs)

	Total (452)	PC Software Decision Makers (368)	Top Management (218)	Company Size 1,000 Or More (170)	100-999 (104)	Under 100 (166)
Sales, Marketing	25%	20%	22%	25%	23%	24%
Finance	16	17	18	20	19	11
General Management	14	15	22	7	13	25
Production/Manufacturing	7	7	7	8	5	7
EDP/MIS	6	7	5	8	10	4
Engineering, Design, R&D	5	6	2	6	7	4
Corporate Development/ Planning	4	5	6	5	5	4
Education	4	4	1	2	7	4
Personnel	4	2	2	4	4	2
Distribution	3	3	3	2	3	4
Maintenance and Servicing	2	2	2	4	1	1
Advertising, Merchandising, Promotion	2	2	2	1	3	2
International Operations	1	1	1	1	-	2
Other	4	4	4	5	-	7
No answer	3	3	3	2	2	1

NUMBER OF EMPLOYEES IN ENTIRE CORPORATION OR FIRM

(Among Those Involved With PCs)

	Total (452)	PC Software Decision Makers (368)	Top Management (218)	Company Size: 1,000 Or More (170)	Company Size: 100-999 (104)	Company Size: Under 100 (166)
1,000 or more employees	37%	35%	21%	100%	-%	-%
10,000 or more	24	22	14	64	-	-
5,000 - 9,999	5	4	2	14	-	-
1,000 - 4,999	8	9	5	22	-	-
100-999 employees	23	24	22	-	100	-
500-999	7	7	5	-	30	-
250-499	8	8	8	-	34	-
100-249	8	9	9	-	36	-
Under 100 employees	37	40	56	-	-	100
50-99	4	4	6	-	-	10
25-49	6	6	9	-	-	18
Under 25 employees	27	30	41	-	-	72
No idea at all	1	*	*	-	-	-
No answer	2	1	1	-	-	-

* Less than 0.5 percent

APPENDIX

FORTUNE

James B Hayes
Publisher

June, 1988

[personalized]

Will you do us a favor?

We are conducting a very short survey among our subscribers and we are turning to you for help. The poll is found on the back of this letter and will take only a moment to fill out.

Because you are part of a scientifically selected sample, your response is vital to the survey's success. Your answers will be treated in complete confidence, and used only in combination with those of the other subscribers in our sample to develop a composite picture.

Your completed poll may be returned to us in the enclosed stamped return envelope.

Thank you for your help with this important project.

Sincerely,

James B. Hayes
Publisher

JBH:rs
Enclosures

P.S. The enclosed dollar bill is meant only as a token of appreciation. It may brighten the day of a youngster you know.

PERSONAL COMPUTER SURVEY

1. Do you personally use or have access to a computer where you work?

6-1 ☐ Yes
-2 ☐ No

2a. Specifically, do you yourself currently use a personal computer at work?

7-1 ☐ Yes
-2 ☐ No

2b. And, do any people who work directly under your supervision use a personal computer at work?

8-1 ☐ Yes
-2 ☐ No

3. Have you ever been involved in any way in the procurement (purchase or lease) of any computer software?

9-1 ☐ Yes
-2 ☐ No

4. Which of the following best describes your job title or position?
(PLEASE "X" **ONE** BOX ONLY.)

10-1 ☐ Chairman of the Board, Company Director
-2 ☐ President, CEO
-3 ☐ Executive VP, Senior VP, Group VP
-4 ☐ VP Treasurer, VP Controller, Other Financial VP
-5 ☐ Other Vice President
-6 ☐ Treasurer, Secretary Treasurer, Controller, Other Financial Officer
-7 ☐ Other Company Officer or Assistant Officer, General Manager
-8 ☐ Owner, Partner
-9 ☐ Department Head
-0 ☐ Other Manager or Supervisor
-A ☐ Salesperson, Broker, Agent, Representative
-B ☐ Trainee, Office Worker, Production Worker, etc.
11-1 ☐ Doctor, Lawyer
-2 ☐ Other Professional/Technical (Accountant, Engineer, etc.)
-3 ☐ Government
-4 ☐ Other (PLEASE SPECIFY): _____ 12-

THANK YOU VERY MUCH!

13-14

001-021A

FORTUNE

James B Hayes
Publisher

August, 1988

Dear Subscriber:

Will you do us a favor?

We are conducting an important survey among our subscribers on personal computers and personal computer software. We are turning to you for help.

A few weeks ago we sent out a very **short** survey on personal computers and we are now sending out the follow-up survey to one half of that sample. We invite **you** to make **your opinions count!**

Because you are part of a scientifically selected sample, your response is vital to the survey's success. Your answers will be treated in complete confidence.

Your completed poll may be returned to us in the enclosed stamped return envelope.

Thank you for your help with this important project.

Sincerely,

James B. Hayes
Publisher

P.S. The enclosed five dollar bill is meant as a token of our appreciation. Please accept it with our thanks.

PC SOFTWARE SURVEY

GENERAL USE

1. Do **you**, yourself, ever use a personal computer (PC) at **work**?

   6-1 ☐ Yes → CONTINUE
   -2 ☐ No → SKIP TO QUESTION 5

2. For how many years have **you** been using a personal computer (PC) at **work**?

   7-1 ☐ Less than 1 year
   -2 ☐ 1 - 2 years
   -3 ☐ 3 - 4 years
   -4 ☐ 5 - 6 years
   -5 ☐ 7 - 8 years
   -6 ☐ 9 - 10 years
   -7 ☐ More than 10 years
   -8 ☐ No idea at all

3. On average, about how many **hours per week** do **you** use a personal computer (PC) at **work**? (WRITE IN NUMBER. IF NONE, PLEASE WRITE IN "0.")

   Number Of Hours
   Use PC At Work
   In An Average **Week:** _____ (8-9)

4. Please indicate the **makes** and **models** of personal computers **you** use at **work**.

	PCs	
	MAKES I Use Now	**MODELS** I Use Now (PLEASE SPECIFY — I.E., MACINTOSH SE, XT, ETC.)
Apple	☐ 10-1	_____ (14-15)
AST	☐ -2	_____ (16-17)
AT&T	☐ -3	_____ (18-19)
Commodore	☐ -4	_____ (20-21)
Compaq	☐ -5	_____ (22-23)
Epson	☐ -6	_____ (24-25)
IBM	☐ -7	_____ (26-27)
Leading Edge	☐ -8	_____ (28-29)
NEC	☐ -9	_____ (30-31)
Tandon	☐ -0	_____ (32-33)
Tandy/Radio Shack	☐ -x	_____ (34-35)
Texas Instruments	☐ -y	_____ (36-37)
Toshiba	☐ 11-1	_____ (38-39)
Wang	☐ -2	_____ (40-41)
Wyse	☐ -3	_____ (42-43)
Other (PLEASE SPECIFY):		
_____	☐ 12-	_____ (44-45)
_____	☐ 13-	_____ (46-47)
No idea at all	☐ 11-y	

5. Are **you** a manager or director in the company where you work?

   48-1 ☐ Yes, I am a top manager/director (Chairman, CEO, President, etc.)
   -2 ☐ Yes, I manage/direct a division
   -3 ☐ Yes, I manage/direct a department
   -4 ☐ No, I am not a manager/director

INSTRUCTIONS:

Some of the questions in this survey ask about how things work in your department or division or company. Please only answer these questions with respect to the department or division or company that **you** manage or direct. If you are not a manager or director in your company, please answer these questions about how things work for **you**.

6a. How likely are you or your department/division/company **to consider** acquiring any personal computers for **work** in the **next 12 months**?

49-1 ☐ Very likely to consider
-2 ☐ Fairly likely to consider
→ CONTINUE

-3 ☐ Not too likely to consider
-4 ☐ Not at all likely to consider
-5 ☐ No idea at all
→ SKIP TO QUESTION 7

6b. As far as you know, which **makes** and **models** of personal computers would you or your department/division/company be likely **to consider** acquiring for **work** in the **next 12 months**?

	PCs	
	MAKES Likely To Consider	**MODELS** Likely To Consider (PLEASE SPECIFY — I.E., MACINTOSH SE, XT, ETC.)
Apple	☐ 50-1	_____ (54-55)
AST	☐ -2	_____ (56-57)
AT&T	☐ -3	_____ (58-59)
Commodore	☐ -4	_____ (60-61)
Compaq	☐ -5	_____ (62-63)
Epson	☐ -6	_____ (64-65)
IBM	☐ -7	_____ (66-67)
Leading Edge	☐ -8	_____ (68-69)
NEC	☐ -9	_____ (70-71)
Tandon	☐ -0	_____ (72-73)
Tandy/Radio Shack	☐ -x	_____ (74-75)
Texas Instruments	☐ -y	_____ (76-77)
Toshiba	☐ 51-1	_____ (6-7) [80-1]
Wang	☐ -2	_____ (8-9)
Wyse	☐ -3	_____ (10-11)
Other (PLEASE SPECIFY):		
_____	☐ 52-	_____ (12-13)
_____	☐ 53-	_____ (14-15)
No idea at all	☐ 51-y	

7. How likely is it that you or your department/division/company will acquire OS/2 operating system(s) for use at **work** in the **next 6 months**? (PLEASE "X" ONLY **ONE** BOX.)

16-1 ☐ Very likely to consider OS/2
-2 ☐ Fairly likely to consider OS/2
-3 ☐ Not too likely to consider OS/2
-4 ☐ Not at all likely to consider OS/2
-5 ☐ Already have OS/2
-6 ☐ No idea at all

8a. In column 8a below, please "X" the types of **peripherals or enhancements you**, yourself, ever use at work with PCs. (PLEASE "X" AS MANY AS APPLY. IF YOU DO NOT USE A PC AT WORK, PLEASE "X" THE LAST BOX IN COLUMN 8a AND GO TO 8b.)

8b. In column 8b below, please "X" the **peripherals or enhancements** that might be acquired for **your** use at work in the **next 6 months.** (PLEASE "X" AS MANY AS APPLY.)

PERIPHERALS OR ENHANCEMENTS	8a I Use Now	8b I Might Acquire
Ink jet printer	☐ 17-1	☐ 20-1
Dot matrix printer	☐ -2	☐ -2
Laser printer	☐ -3	☐ -3
Hard disk drive	☐ -4	☐ -4
Plotter	☐ -5	☐ -5
Internal modem	☐ -6	☐ -6
External modem	☐ -7	☐ -7
Color monitor	☐ -8	☐ -8
Graphics board	☐ -9	☐ -9
Expanded memory board (allowing more than 640K)	☐ -0	☐ -0
Local area network (LAN) board	☐ -x	☐ -x
FAX board	☐ -Y	☐ -Y
Scanner	☐ 18-1	☐ 21-1
Other (PLEASE SPECIFY): _____	☐ 19-	☐ 22-
None of these	☐ 18-0	☐ 21-0
No idea at all	☐ -x	☐ -x
I do not use a PC now	☐ -y	

MANAGEMENT OF PC USERS

1. Do you **manage or supervise** any people at work who use a PC?

23-1 ☐ Yes, I manage PC users at work → CONTINUE
-2 ☐ No, I do **not** manage PC users at work, although I personally use a PC at work → SKIP TO QUESTION 4

2. **Including your own,** how many PCs are there in the immediate department/division/company that you **manage or supervise**?

24-1 ☐ 1 - 2 PCs
-2 ☐ 3 - 4 PCs
-3 ☐ 5 - 9 PCs
-4 ☐ 10 - 19 PCs
-5 ☐ 20 - 49 PCs
-6 ☐ 50 - 99 PCs
-7 ☐ 100 - 199 PCs
-8 ☐ 200 or more PCs (IF 200 PCs OR MORE, PLEASE SPECIFY APPROX. NUMBER: _____) 25-27
-9 ☐ No idea at all

3a. In column 3a below, please "X" the types of **peripherals or enhancements** the **people you manage** use at work with their PCs.
(PLEASE "X" AS MANY AS APPLY.)

3b. In column 3b below, please "X" the **peripherals or enhancements** that might be acquired in the **next 6 months** for the use of the **people you manage** at work.
(PLEASE "X" AS MANY AS APPLY.)

PERIPHERALS OR ENHANCEMENTS	3a People I Manage Use Now	3b Might Acquire For People I Manage
Ink jet printer	☐ 28-1	☐ 31-1
Dot matrix printer	☐ -2	☐ -2
Laser printer	☐ -3	☐ -3
Hard disk drive	☐ -4	☐ -4
Plotter	☐ -5	☐ -5
Internal modem	☐ -6	☐ -6
External modem	☐ -7	☐ -7
Color monitor	☐ -8	☐ -8
Graphics board	☐ -9	☐ -9
Expanded memory board (allowing more than 640K)	☐ -0	☐ -0
Local area network (LAN) board	☐ -x	☐ -x
FAX board	☐ -y	☐ -y
Scanner	☐ 29-1	☐ 32-1
Other (PLEASE SPECIFY): _____	☐ 30-	☐ 33-
None of these	☐ 29-0	☐ 32-0
No idea at all	☐ -x	☐ -x

4. Does the immediate department/division/company that you manage have a **Local Area Network (LAN)** system — that is, ways of linking a number of computers (in an office, for example) through communication lines so that they can share peripherals and data?

34-1 ☐ Yes → SKIP TO NEXT SECTION ON "PC SOFTWARE"
-2 ☐ No → CONTINUE
-3 ☐ No idea at all → CONTINUE

5. How likely do you think your department/division/company is to acquire a **Local Area Network (LAN)** system in the **next 6 months**?

35-1 ☐ Very likely
-2 ☐ Fairly likely
-3 ☐ Not too likely
-4 ☐ Not at all likely
-5 ☐ No idea at all

PC SOFTWARE

1a. In column 1a below, please "X" the types of PC **software**, if any, **you**, yourself, use at **work**. (PLEASE "X" ALL THAT APPLY. IF YOU DO NOT USE ANY PC SOFTWARE AT WORK, PLEASE "X" THE BOX AT THE BOTTOM OF COLUMN 1a AND GO TO 1b.)

1b. In column 1b below, please "X" the types of PC **software,** if any, the **people you manage** use at **work**. (PLEASE "X" ALL THAT APPLY. IF YOU DO NOT MANAGE PEOPLE WHO USE PCs, PLEASE "X" THE BOX AT THE BOTTOM OF COLUMN 1b AND GO TO 1c.)

1c. In column 1c below, please "X" the types of PC **software**, if any, your **department/division or company** might consider acquiring in the **next 6 months.** (PLEASE "X" ALL THAT APPLY. IF YOUR DEPARTMENT/DIVISION/COMPANY DOES NOT INTEND TO ACQUIRE PC SOFTWARE IN THE NEXT 6 MONTHS, PLEASE "X" THE BOX AT THE BOTTOM OF COLUMN 1c AND CONTINUE.)

	PC SOFTWARE		
	1a	1b	1c
	I Use Now	People I Manage Use Now	Department/ Division/ Company Might Acquire
Word processing	☐ 36-1	☐ 40-1	☐ 44-1
Spreadsheet	☐ -2	☐ -2	☐ -2
Relational data base management	☐ -3	☐ -3	☐ -3
Flat file data base management	☐ -4	☐ -4	☐ -4
Integrated/multi-function	☐ -5	☐ -5	☐ -5
CAD/CAM	☐ -6	☐ -6	☐ -6
Graphics	☐ -7	☐ -7	☐ -7
Presentation package	☐ -8	☐ -8	☐ -8
Desktop publishing	☐ -9	☐ -9	☐ -9
Time and calendar organizer	☐ -0	☐ -0	☐ -0
Communications	☐ -x	☐ -x	☐ -x
Accounting	☐ -y	☐ -y	☐ -y
Project management	☐ 37-1	☐ 41-1	☐ 45-1
General business	☐ -2	☐ -2	☐ -2
Other (PLEASE SPECIFY):			
_____	☐ 38-	☐ 42-	☐ 46-
_____	☐ 39-	☐ 43-	☐ 47-
_____			
No idea at all	☐ 37-0	☐ 41-0	☐ 45-0
None of these	☐ -x	☐ -x	☐ -x

2. Which of the following PC/microcomputer software programs, if any, have you ever **heard of**? (PLEASE "X" AS MANY AS APPLY.)

48-1 ☐ ACCPAC	49-1 ☐ MultiMate	50-1 ☐ Smartform
-2 ☐ AppleWorks	-2 ☐ MultiPlan	-2 ☐ SuperCalc
-3 ☐ Chart-Master	-3 ☐ 1-2-3	-3 ☐ SuperProject Expert
-4 ☐ Cricket	-4 ☐ Pagemaker	-4 ☐ Symphony
-5 ☐ dBASE III	-5 ☐ Paradox	-5 ☐ Ventura Publisher
-6 ☐ DisplayWrite	-6 ☐ PFS:First Publisher	-6 ☐ Windows
-7 ☐ Excel	-7 ☐ PFS:Professional Write	-7 ☐ Word
-8 ☐ Framework	-8 ☐ Power Point	-8 ☐ WordPerfect
-9 ☐ Harvard Graphics	-9 ☐ Quattro	-9 ☐ WordStar
-0 ☐ MacDraw	-0 ☐ RapidFile	-0 ☐ Works
-x ☐ MacProject	-x ☐ Sales Generator Plus	
-y ☐ Master Graphics	-y ☐ Silverado	-y ☐ None of these

3. As you may know, PC **software manufacturers** often produce several different PC **software programs**.

Using the numbers next to the manufacturers in the box below, please indicate which **manufacturer** you think produces **each** of the **software programs** listed below.

(WRITE IN THE NUMBER BELOW WHICH CORRESPONDS TO THE MANUFACTURER FOR EACH SOFTWARE PROGRAM. FOR EXAMPLE, IF YOU THINK A PARTICULAR SOFTWARE PROGRAM IS MANUFACTURED BY **IBM**, WRITE IN A NUMBER 8 NEXT TO IT IN THE SPACE PROVIDED. IF YOU ARE NOT SURE WHO THE MANUFACTURER IS, PLEASE LEAVE IT BLANK.)

MANUFACTURERS

1. Aldus Corporation
2. Ansa Software
3. Ashton-Tate
4. Borland International
5. Claris Corporation
6. Computer Associates International
7. Cricket Software
8. IBM
9. Lotus Development Corporation
10. MicroPro
11. Microsoft Corporation
12. Software Publishing Corporation
13. Supersell Software Inc.
14. WordPerfect Corporation
15. Xerox Corporation

Software Programs	Manufacturer's Number	Software Programs	Manufacturer's Number
ACCPAC	_____ (51-52)	PFS:First Publisher	_____ (14-15)
AppleWorks	_____ (53-54)	PFS:Professional Write	_____ (16-17)
Chart-Master	_____ (55-56)	Power Point	_____ (18-19)
Cricket	_____ (57-58)	Quattro	_____ (20-21)
dBASE III	_____ (59-60)	RapidFile	_____ (22-23)
DisplayWrite	_____ (61-62)	Sales Generator Plus	_____ (24-25)
Excel	_____ (63-64)	Silverado	_____ (26-27)
Framework	_____ (65-66)	Smartform	_____ (28-29)
Harvard Graphics	_____ (67-68)	SuperCalc	_____ (30-31)
MacDraw	_____ (69-70)	SuperProject Expert	_____ (32-33)
MacProject	_____ (71-72)	Symphony	_____ (34-35)
Master Graphics	_____ (73-74)	Ventura Publisher	_____ (36-37)
MultiMate	_____ (75-76)	Windows	_____ (38-39)
MultiPlan	_____ (6-7) [80-2]	Word	_____ (40-41)
1-2-3	_____ (8-9)	WordPerfect	_____ (42-43)
Pagemaker	_____ (10-11)	WordStar	_____ (44-45)
Paradox	_____ (12-13)	Works	_____ (46-47)

PURCHASE DECISION-MAKING

1. Do you have an **EDP** (Electronic Data Processing) or **MIS** (Manager of information Systems) department or some equivalent in your company?

48-1 ☐ Yes → CONTINUE
-2 ☐ No → SKIP TO QUESTION 3
-3 ☐ No idea at all → SKIP TO QUESTION 3

2. Compared to 2 or 3 years ago, would you say that the **EDP** or **MIS** department is **more involved** now, **less involved** now, or **as involved** now in your company's decisions to acquire PC **software**?

49-1 ☐ More involved now
-2 ☐ Less involved now
-3 ☐ As involved now
-4 ☐ No idea at all

3. Companies vary in the extent to which they allow users to choose the kinds and brands of PC **software** they can acquire. To the best of your knowledge, please "X" the policy or policies which **your** company currently has. (PLEASE "X" AS MANY AS APPLY.)

50-1 ☐ Must have approval of EDP/MIS department
-2 ☐ Must have approval of business office
-3 ☐ Must have approval of department head
-4 ☐ New purchases must be compatible with existing equipment/products
-5 ☐ Must document need to someone else
-6 ☐ You can purchase up to a certain dollar amount without higher authorization. (Up to what dollar amount? $_____)
-7 ☐ There are recommended brands, but you are allowed to buy others
-8 ☐ You are only allowed to buy particular brands
-9 ☐ There is no policy
-0 ☐ None of these

4. Please "X" the ways in which **you** are involved in your own or your department's/division's/company's decisions to acquire PC **software.** (PLEASE "X" AS MANY AS APPLY.)

51-1 ☐ Assessing the need
-2 ☐ Determining capabilities or features needed
-3 ☐ Evaluating brands
-4 ☐ Recommending or specifying brands
-5 ☐ Recommending or specifying manufacturers
-6 ☐ Recommending or specifying the source or outlet from which to acquire the software
-7 ☐ Making final decision to acquire
-8 ☐ Authorizing expenditures
-9 ☐ None of these

5. How important are **each** of the following factors in your decision or your department's/division's/company's decision to acquire a particular PC **software** program?

	Very Important	Fairly Important	Not Too Important	Not At All Important	
Training is offered	☐ -1	☐ -2	☐ -3	☐ -4	(52)
Can get phone support when needed	☐ -1	☐ -2	☐ -3	☐ -4	(53)
Easy to learn for beginners	☐ -1	☐ -2	☐ -3	☐ -4	(54)
Easy to learn for advanced users	☐ -1	☐ -2	☐ -3	☐ -4	(55)
Established manufacturer	☐ -1	☐ -2	☐ -3	☐ -4	(56)
Good reputation	☐ -1	☐ -2	☐ -3	☐ -4	(57)
Price	☐ -1	☐ -2	☐ -3	☐ -4	(58)
Fast processing	☐ -1	☐ -2	☐ -3	☐ -4	(59)
Technologically sophisticated	☐ -1	☐ -2	☐ -3	☐ -4	(60)
Low risk of obsolescence	☐ 1	☐ -2	☐ -3	☐ -4	(61)
Other (PLEASE SPECIFY):					
_____ 64-	☐ -1	☐ -2	☐ -3	☐ -4	(62)
_____ 65-	☐ -1	☐ -2	☐ -3	☐ -4	(63)

6. Who do you think should provide **training** for the PC **software** used at **work**? (PLEASE "X" ONLY **ONE** BOX.)

66-1 ☐ The manufacturer of the software
-2 ☐ The retail store or dealer from which the software was purchased
-3 ☐ Company personnel
-4 ☐ Other (PLEASE SPECIFY): _____

7. From time to time, users need to decide what is more important to them — being **familiar** with the software manufacturer or getting the most **technologically sophisticated** software program for their needs. If **you had to choose** between the two — which **one** is more important to **you**? (PLEASE "X" ONLY ONE BOX.)

67-1 ☐ **Familiarity** with the software manufacturer
-2 ☐ The **technological sophistication** of the software program
-3 ☐ **No idea at all**

8a. In column 8a below, please "X" the **sources,** if any, from which **you** or your **department/division/company** have **ever acquired** PC **software**. (PLEASE "X" AS MANY AS APPLY.)

8b. In column 8b below, please "X" the **sources**, if any, from which you or your **department/division/company** acquire PC **software most often.** (PLEASE "X" AS MANY AS APPLY.)

SOFTWARE SOURCES	8a Ever Acquired From	8b Acquire From Most Often
From computer retail stores	☐ 68-1	☐ 70-1
Direct from the manufacturer	☐ -2	☐ -2
From software-only stores	☐ -3	☐ -3
From office supply stores	☐ -4	☐ -4
From mail order catalogues	☐ -5	☐ -5
From an 800 toll-free number	☐ -6	☐ -6
From mass merchandisers/department stores	☐ -7	☐ -7
From distributors	☐ -8	☐ -8
From consultants, value-added resellers or systems houses	☐ -9	☐ -9
From company EDP/MIS department	☐ -0	☐ -0
Other (PLEASE SPECIFY): _____	69- ☐	71- ☐
Never acquired software	☐ 69-0	☐ 71-0
None of these	☐ -x	☐ -x
No idea at all	☐ -y	☐ -y

9. If **you,** or your **department/division/company** have acquired a PC **software** program in the **past 12 months**, please rank in order of importance what influenced your decision to acquire that particular program. Give the number **"1"** to the **most important** influence, the number **"2"** to the **next most important** influence, and so on.

(IF YOU HAVE **NOT** ACQUIRED A PC SOFTWARE PROGRAM IN THE **PAST 12 MONTHS**, PLEASE "X" THIS BOX ☐ 79-y AND SKIP TO THE NEXT SECTION ON "SOURCES OF INFORMATION.")

	Rank (Enter Number)
Friend's recommendation	_____ (72)
Salesperson's recommendation	_____ (73)
Colleague's recommendation	_____ (74)
EDP/MIS department's recommendation	_____ (75)
Product review	_____ (76)
Manufacturer's literature, information	_____ (77)
Other (PLEASE SPECIFY): _____ 79-	_____ (78)

SOURCES OF INFORMATION

1. For **each** of the following activities, please indicate which ones, if any, **you** have done in the **past 12 months.** (PLEASE "X" AS MANY AS APPLY.)

6-1 ☐ Read PC-oriented magazines
-2 ☐ Read books about computers
-3 ☐ Read articles about new computer developments in general business magazines
-4 ☐ Read or looked at advertisements about PCs or PC products
-5 ☐ Discussed personal computers with friends and/or colleagues
-6 ☐ Attended computer conferences or trade shows
-7 ☐ Visited computer stores
-8 ☐ Visited PC software stores
-9 ☐ Mailed away for more information about PCs or PC products
-0 ☐ Used an 800 toll-free number for PC information
-x ☐ Took courses in computer literacy or applications
-y ☐ Took courses in a computer programming language

7-1 ☐ None of these

2. Which of the following PC-oriented magazines, if any, do **you** read on a **regular basis**? (PLEASE "X" AS MANY AS APPLY.)

8-1 ☐ BYTE
-2 ☐ Compute!
-3 ☐ ComputerWorld
-4 ☐ Datamation
-5 ☐ Family And Home Office Computing
-6 ☐ Information Week
-7 ☐ InfoWorld
-8 ☐ Lotus
-9 ☐ MacUser
-0 ☐ MacWeek
-x ☐ MacWorld
-y ☐ MIS Week
9-1 ☐ Online Today
-2 ☐ PC Computing
-3 ☐ PC Magazine
-4 ☐ PC Week
-5 ☐ PC World
-6 ☐ Personal Computing
-7 ☐ Other (PLEASE SPECIFY):

_____ 10-

-8 ☐ None of these

PC USAGE AT HOME

1. Do **you**, yourself, ever use a personal computer at **home**?

11-1 ☐ Yes, for **business** reasons
-2 ☐ Yes, for **personal** reasons
-3 ☐ Yes, for both **business** and **personal** reasons
-4 ☐ No, do not use PC at home

2. How likely are you to consider purchasing a personal computer for your **home**, or upgrading the personal computer you now have at home in the **next 12 months**?

12-1 ☐ Very likely to consider
-2 ☐ Fairly likely to consider
-3 ☐ Not too likely to consider
-4 ☐ Not at all likely to consider
-5 ☐ No idea at all

PC ATTITUDES AND EXPERIENCE

1. Which **one** of the following descriptions best describes **your** experience and abilities with using PCs? (PLEASE "X" ONLY **ONE** BOX.)

13-1 ☐ I have **no experience** with personal computers → SKIP TO NEXT SECTION "ABOUT YOU"

-2 ☐ I am a **beginner** user of personal computers
-3 ☐ I am a **competent** user of personal computers
-4 ☐ I am a **professional** user of personal computers, that is, I am employed for my computing expertise

→ CONTINUE

2. How **enjoyable** do you find using PCs?

14-1 ☐ Very enjoyable
-2 ☐ Fairly enjoyable
-3 ☐ Not too enjoyable
-4 ☐ Not at all enjoyable

3. How often are **you** asked for your opinion or advice regarding personal computers and personal computer-related products?

15-1 ☐ Often
-2 ☐ Sometimes
-3 ☐ Seldom
-4 ☐ Never

ABOUT YOU

1. Which **one** of the following best describes your job title or position? (PLEASE "X" ONLY **ONE** BOX.)

16-1 ☐ Chairman of the Board, Company Director
-2 ☐ President, CEO
-3 ☐ Executive VP, Senior VP, Group VP
-4 ☐ VP Treasurer, VP Controller, Other Financial VP
-5 ☐ Other Vice President
-6 ☐ Treasurer, Secretary-Treasurer, Controller, Other Financial Officer
-7 ☐ Other Company Officer or Assistant Officer, General Manager
-8 ☐ Owner, Partner
-9 ☐ Department Head
-0 ☐ Other Manager or Supervisor
-x ☐ Salesperson, Broker, Agent, Representative
-y ☐ Trainee, Office Worker, Production Worker, etc.
17-1 ☐ Doctor, Lawyer
-2 ☐ Other Professional/Technical (Accountant, Engineer, etc.)
-3 ☐ Government
-4 ☐ Other (PLEASE SPECIFY): _____

2. What is the **principal** activity of the company (or department/division, if applicable) for which you work? (PLEASE "X" ONLY **ONE** BOX.)

18-1 ☐ Manufacturing, Processing, Publishing
-2 ☐ Transportation, Communications, Utilities
-3 ☐ Mining, Oil or Gas Extractions
-4 ☐ Construction, Engineering
-5 ☐ Banking, Finance, Insurance
-6 ☐ Wholesale or Retail Trade
-7 ☐ Real Estate
-8 ☐ Medical Services
-9 ☐ Other Professional or Business Services
(Accounting, Data Processing, Consulting, etc.)
-0 ☐ Education
-x ☐ Government
-y ☐ Other (PLEASE SPECIFY): _____ 19-

3. Which **one** of the following functions best describes your department or division? (PLEASE "X" ONLY **ONE** BOX.)

20-1 ☐ Production, Manufacturing
-2 ☐ Engineering, Design, R & D
-3 ☐ Maintenance and Servicing
-4 ☐ Distribution
-5 ☐ Sales, Marketing
-6 ☐ Advertising, Merchandising, Promotion
-7 ☐ EDP/MIS
-8 ☐ Finance
-9 ☐ Corporate Development/Planning
-0 ☐ International Operations
-x ☐ Personnel
-y ☐ General Management
☐ Other (PLEASE SPECIFY): _____ 21-

4. Approximately how many employees are there in your entire corporation or firm — that is, the total number of employees **including all plants, divisions, branches and subsidiaries**?

22-1 ☐ Fewer than 25 employees
-2 ☐ 25 - 49 employees
-3 ☐ 50 - 99 employees
-4 ☐ 100 - 249 employees
-5 ☐ 250 - 499 employees
-6 ☐ 500 - 999 employees
-7 ☐ 1,000 - 4,999 employees
-8 ☐ 5,000 - 9,999 employees
-9 ☐ 10,000 or more employees
-0 ☐ No idea at all

5. In which state do you reside?

_____ (23-24)

(Please do not abbreviate.)

[80-4]

THANK YOU VERY MUCH!

001-021B

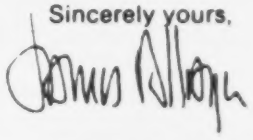
Please use this space for any additional comments you may have.

Dear Subscriber:

Recently we wrote you asking for your participation in an important FORTUNE survey. If you have already returned the questionnaire, please consider this card a "thank you" for your valuable help.

If you have not had a chance to do so as yet, may we ask you to return the completed form now? We'll be grateful for your help.

Sincerely yours,



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